

Alexandria[®]

VERSION 7

BASIC TRAINING GUIDE



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INTRODUCTION

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

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

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

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

HELP & SUPPORT

1 Best Practices

Backup, Backup, Backup

Self Hosted users will need to create their own data backups. A backup is a copy of your Archive folder that is saved to an external medium such as an external hard drive, flash drive, network file server, or a backup service on the cloud. [Learn more about backing up your data.](#)



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

Automatic Archives and Database Management

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

Archiving is something Alexandria does automatically for you on a nightly basis. It can be used to restore data that has been lost.

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


Enable Security

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

To customize the permissions granted to a Security Group:


1. Click **Tools** from the Librarian sidenav, and click on **Security**.
2. Click on the **Security Group** you wish to customize.
3. Using the dropdown menus on all tabs, consider the options given and grant permissions as you wish for operators assigned to the chosen security group. The permissions listed in each dropdown menu are hierarchal, meaning the permissions listed above the selected permission will also be granted.
4. When finished, click on **Save** in the upper-right corner of the window.

To add an operator:

1. Click on the **Patrons** module from the **Librarian sidenav**.
2. Unlock **Patrons Management** by clicking the **Lock** icon . Click **Add Patrons** or the **Add (+)** button near the top right corner to add a new patron to your database. If the person is already in the system, search for the patron using the **simple** or **advanced search**.
3. Use the **Security Group** drop down menu on the **Access** tab to select the appropriate security group. Click on **Save**.

2 Support Center



Alexandria provides built-in Help documents. These can be accessed in either of two ways.

In the upper right corner of the **Librarian topnav**, you will see the **Help Menu** icon . Clicking this icon will open the help menu, by clicking **Support Center** Alexandria will open the document associated with that window in the **Alexandria Support Center website**. The second method is to simply search for help documents in the Support Center.

3 Message Center

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

To view the Message Center:

Click on the **Message Drawer** icon . The most recent message from COMPanion will be listed at the bottom of the drawer. To open the Message Center, click **Messages from COMPanion Corporation** to display a list of your notifications; when you have unread notifications or new messages are available, a red dot appears on the Message Drawer icon .

4 Tip of the Week


Tip of the Week features a new tip for using Alexandria each week. The Tip of the Week archives are a collection of past tips that can help you run Alexandria more smoothly. Access the Tip of the Week archives from your **Dashboard**. You may also sign up to receive them via email so you never miss a tip!

Go to <https://www.goalexandria.com/tipoftheweek> and fill in the form to receive our weekly newsletter.


5 24/7 Customer Support

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

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

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

To email Customer Support:

1. Click on the **Help Menu**  from the **Librarian topnav** and select **Contact us**.
2. Type the subject and the desired message in the appropriate fields.
3. Indicate the preferred destination of the message from within the **Send to** dropdown menu.



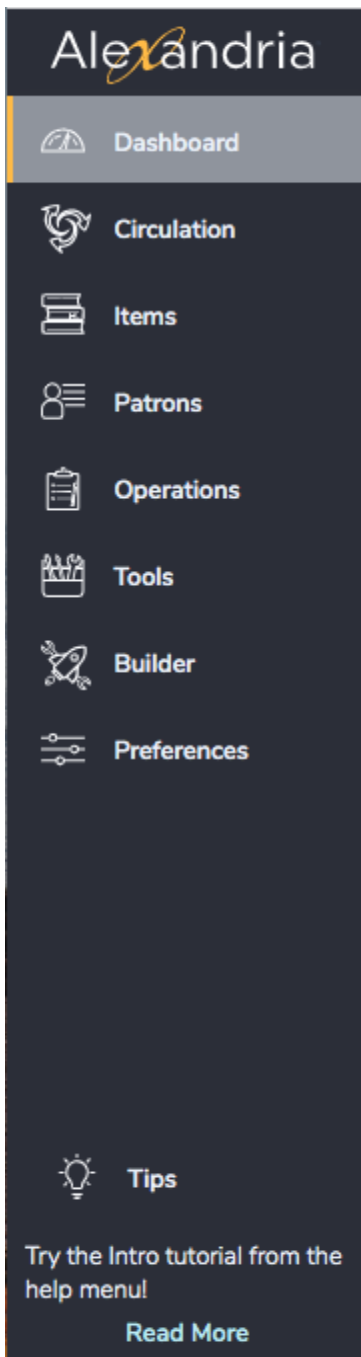
In order to email Customer Support, you must have a return email specified in **Sites Management** (accessed from **Tools**) and your **Email Preferences** (accessed from **Preferences > Setup**) entered correctly.

LIBRARIAN

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

1 Navigation

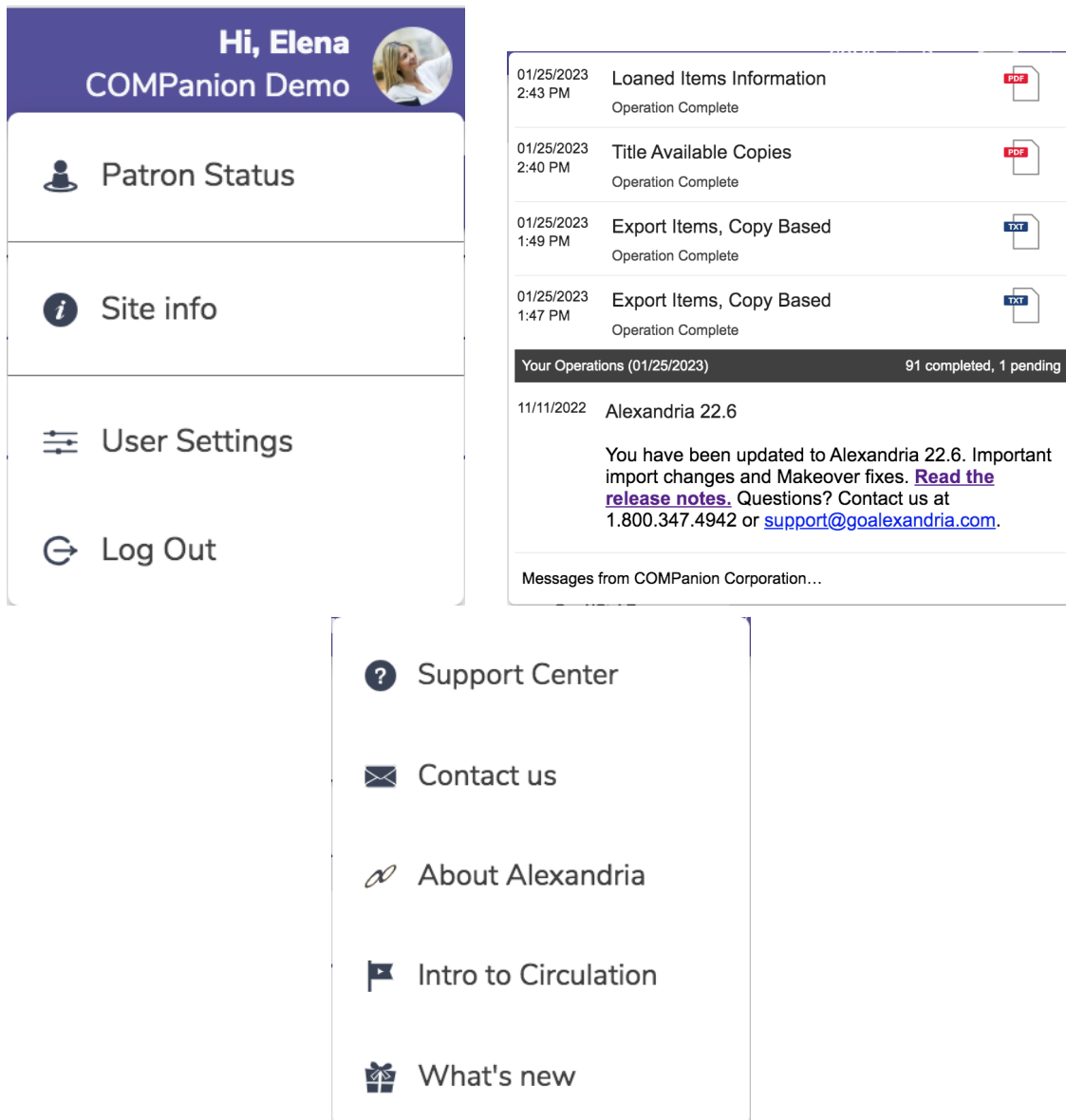
Sidenav



The **Librarian sidenav** is the long, vertical bar to the left of the program. Use the sidenav to navigate to the different areas of Alexandria. The sidenav can be collapsed and expanded by clicking on the Alexandria logo at the top. At the bottom of the sidenav, you will see some helpful tips.






Topnav

The **Librarian topnav** is the long, horizontal bar at the top of the program that is shown at all times. The topnav includes the **user menu**, **message drawer**, and **help menu**.







The screenshot displays the Librarian topnav interface. On the left is the user menu, which includes options for Patron Status, Site info, User Settings, and Log Out. On the right is the message drawer, showing a list of operations and a notification about an update to Alexandria 22.6. Below the message drawer is the help menu, which includes links to the Support Center, Contact us, About Alexandria, Intro to Circulation, and What's new.

User Menu:

- Hi, Elena
COMPanion Demo 
-  Patron Status
-  Site info
-  User Settings
-  Log Out

Message Drawer:

01/25/2023 2:43 PM	Loaned Items Information Operation Complete	
01/25/2023 2:40 PM	Title Available Copies Operation Complete	
01/25/2023 1:49 PM	Export Items, Copy Based Operation Complete	
01/25/2023 1:47 PM	Export Items, Copy Based Operation Complete	






Your Operations (01/25/2023) 91 completed, 1 pending

11/11/2022 Alexandria 22.6

You have been updated to Alexandria 22.6. Important import changes and Makeover fixes. [Read the release notes](#). Questions? Contact us at 1.800.347.4942 or support@goalexandria.com.

Messages from COMPanion Corporation...

Help Menu:

-  Support Center
-  Contact us
-  About Alexandria
-  Intro to Circulation
-  What's new

2 Dashboard

Dashboard is the first page you see after logging into your Alexandria Librarian. See some basic statistics for your site at the top of the dashboard and program icons to access the main areas of **Librarian**.

The screenshot shows the Alexandria Librarian Dashboard. At the top left, the 'Alexandria' logo is displayed. The top right corner shows the user 'Hi, Demo' and 'COMPanion Demo' with a profile icon, a chat icon, and a help icon. A dark sidebar on the left contains navigation links: Dashboard, Circulation, Items, Patrons, Operations, Tools, Builder, Preferences, and Tips, with a 'Read More' link at the bottom. The main content area is titled 'Dashboard' and features the 'Alexandria' logo. It is divided into three sections: 'Today' (Copies checked out: 353, Copies returned: 0, Activity sign-ons: 0), 'In-stock holds' (3), 'On-shelf holds' (0), 'Reservations' (0), and 'Overview' (Copies out: 355, Copies overdue: 104, Pending reviews: 0). Below these are icons for Circulation (Cmd/Ctrl 2), Items (Cmd/Ctrl 3), Patrons (Cmd/Ctrl 4), Operations (Cmd/Ctrl 5), Reports (Cmd/Ctrl sh5), Tools (Cmd/Ctrl 6), Builder (Cmd/Ctrl 7), Preferences (Cmd/Ctrl 8), Utilities, Explore Builder, Policies, and Authority Control. On the right, a 'Tip of the Week' section features a lightbulb icon and text: 'Did you see the latest tip? It was [Share your top titles](#). If you didn't see it, [subscribe to Tip of the Week here!](#)'

PATRONS

1 Adding Patrons Manually

The screenshot displays the Alexandria Patrons Management interface. On the left is a dark sidebar with navigation icons and labels: Dashboard, Circulation, Items, Patrons (highlighted), Operations, Tools, Builder, Preferences, and Tips. The main content area is titled 'Patrons Management' and features a search bar with 'Name' and 'Site: COMP' dropdowns, and an 'Advanced Search' button. Below the search bar is a list of patrons, currently showing 'No results.' To the right is a form for adding a new patron, with a 'Revert' button in red and a 'Save' button in green. The form includes a profile picture placeholder (155x200) and fields for 'First | Middle | Last Name *', 'Barcode', 'Site', 'Status', and 'Policy' (set to 'Standard Patron'). Below these are tabs for 'Personal', 'Contact', 'Access', 'Notes', and 'Statistics'. The 'Personal' tab is active, showing 'Identifiers' with fields for 'Student #', 'Birth Date' (mm/dd/yyyy), 'Sex' (Choose an Item...), 'SSN', and 'Nickname'. The 'Locators' section has fields for 'Homeroom *', '2nd Location *', and 'Grade *'. A 'RSN GUID' field is visible on the right side of the form.

To add a new patron record:

1. Click on the **Patrons** module from the **Librarian sidenav**. (TRICK: You may also click on the **Current Patron**'s name or on the words **No Current Patron** in the **Circulation** window).
2. Unlock **Patrons Management** by clicking the **Lock** icon . Click **Add Patrons** or the **Add (+)** button near the top right corner to add a new patron to your database.
3. Move between the **Personal**, **Contact**, **Access**, **Notes**, and **Programs** tabs, providing information, configuration options, and making changes to the patron record as needed.
4. Use the dropdown menus to supply the new patron's **Policy**, **Status**, and **Sex**.
5. Use the **Notes** tab to add any special patron alert notes.
6. Next, if you intend to give your new patron any operator privileges (e.g. Student Aide), use the **Site Access** selection on the **Access** tab to mark the sites that your patron is permitted to access. Otherwise, leave this selection alone.
7. Click **Save** to add your new patron record or **Revert** to discard them.

2 Modifying Patron Records

Alexandria

Hi, Demo
COMPanion Demo

Patrons Management

Name Anderson

Advanced Search

Modified Date

1/30/2023
Darla Anderson

4/29/2022
Dustin Anderson

First | Middle | Last Name *

Darla Anderson

Barcode * 1001 Site COMP | COMPanion Demo

Status Active Policy High Student

Personal Contact Access Notes Statistics

Identifiers

Student # 1001 Birth Date 1/1/2004 Sex Female

SSN Nickname


Locators

Homerom * 2nd Location * Grade * GUID 0ebc30a3-c877-4d66-a70b-7b12acb0471e RSN 182

2 / 610



Last modified by System Administrator on 01/30/2023 at 12:06 AM

To modify a patron record:

1. Click on the **Patrons** module from the **Librarian sidenav**.
2. Use the **Basic** or **Advanced Search** at the top right of patrons management.
3. Then select the desired patron from the list in the left pane.
4. Unlock the patron's record by clicking on the **Lock** icon .
5. Go through each of the tabs to make changes to the patron's record and click **Save**.

3 Deleting Patrons

To remove a patron record:

1. Click on **Patrons** from the **Librarian sidenav**.
2. Locate the patron's record and highlight the patron's name in the left pane.
3. Unlock the patron's record by clicking on the **Lock** icon .
4. Click on the **Actions Menu**  and select **Remove Patron**.



Pay close attention to the Remove Patron window as it will inform you if the patron has items checked out, charges, or credits.

ITEMS

1 Finding Items

The screenshot displays the Alexandria Items Management interface. On the left is a dark sidebar with navigation options: Dashboard, Circulation, Items (highlighted), Patrons, Operations, Tools, Builder, Preferences, and Tips. The main content area is titled 'Items Management' and shows a search for 'The Giving Tree'. The search results list the item with a modification date of 5/9/2019. The item details include a cover image, title 'The giving tree', author 'Silverstein, Shel', and call number 'E SIL'. Below the details are tabs for 'Publication', 'Copies', 'Subjects', 'Terms', and 'Notes'. The 'Publication' tab is active, showing fields for Series, Genre (Fiction), Policy (Easy Reader), Medium ([book]), ISBN/ISSN (0060256656), and LCCN (64011840). The interface also shows '3 / 3 copies available' and a 'Last modified by demo demo on 05/09/2019 at 11:57 AM' timestamp.

The screenshot shows the 'Advanced Search' dialog box. It has a title bar with 'Advanced Search' and a close button. The dialog is organized into sections: 'BASICS', 'COPY', and 'PUBLICATION'. The 'PUBLICATION' section is expanded and contains the following fields: ISBN/LCCN (text input), Publisher * (dropdown menu), Publication Year * (dropdown menu), Medium (dropdown menu), Series * (dropdown menu), Genre * (dropdown menu), and a checkbox for 'Combine with current results'.

To find an item record:

1. Click on the **Items** icon from the **Librarian sidenav**. **Items Management** will open.
2. Use the **Basic** or **Advanced Search** at the top right of items management.
3. Your results will be listed in the left pane.

2 Adding and Cataloging Titles

Alexandria

Hi, Demo
COMPanion Demo

Dashboard
Circulation
Items
Patrons
Operations
Tools
Builder
Preferences

Items

SmartMARC® Title Assistant

Select a title to add it to your collection, or press SKIP to add a title manually. Titles already in your collection are marked in bold; selecting a bolded title will let you add a copy instead.

Title	Medium	Location
The Lorax	[book]	Local
Dr. Seuss the Lorax	Projected Medium	OH - Special - OhioLINK
Dr. Seuss' The Lorax	Projected Medium	OH - Special - OhioLINK
Dr. Seuss' the Lorax	Projected Medium	OH - Special - OhioLINK
I am the Lorax	text-unmediated-volume	DC - Special - Library of Congre...
Cooking with the Lorax	text-unmediated-volume	DC - Special - Library of Congre...
Look for the Lorax	text-unmediated-volume	OH - Special - OhioLINK
The Lorax	text-unmediated-volume	OH - Special - OhioLINK
The Lorax sculpture outside the The Amazing World of ...	still image-computer-onli...	DC - Special - Library of Congre...
The Lorax	two-dimensional moving i...	OH - Special - OhioLINK
Dr. Seuss' The Lorax	Musical Sound Recordina	DC - Special - Library of Conare...

Completed. 3 databases examined

CANCEL BACK SKIP CONTINUE

1 / 5596

Last modified by demo demo on 05/09/2019 at 11:57 AM

To add a new title record to your database:

1. Click on **Items** from the **Librarian sidenav**.
2. Unlock **Items Management** by clicking the **Lock icon** . Click **Add Items** or the **Add (+)** button near the top right corner.
3. The **SmartMARC® Title Assistant** will open allowing you to add a new title record. (Press **<enter>** here to add a blank record.)
4. Enter the **ISBN** or **Title/Author** in the **Title Assistant** window and click **Search**.
5. Click and highlight to preview the MARC record you like best and click **Continue**.
 - a. **Local** matches (i.e. results matching bibliographic records already existing in your collection) will be shown first, before other sources in your results list.
6. Modify the **Call Number**, update any necessary fields, and select the proper **Policy** for the item from the **Policy** dropdown menu.
7. Click **Save** to add your new title record or **Revert** to discard it. At this time you will want to add the initial copy.




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

3 Adding New Copies

The screenshot shows the Alexandria library system interface. The top navigation bar includes the Alexandria logo, user information (Hi, Demo), and a help icon. The left sidebar contains navigation options: Dashboard, Circulation, Items (highlighted), Patrons, Operations, Tools, Builder, and Preferences. The main content area is titled 'Items Management' and shows the title 'The Lorax' by Dr. Seuss. The 'Copies' tab is selected, displaying a list of existing copies with columns for Barcode, Site, Status, Inventoried, and Accession. A form to add a new copy is visible, with fields for Barcode (1300000), Call Number, Volume, Serial #, Policy (Easy Reader), and Condition (Unknown). The interface also shows a 'Revert' button, a 'Save' button, and an 'Actions' menu.


To add a new copy to the title record:

1. Click on **Items** from the **Librarian sidenav**.
2. Locate the title in your database you would like to add copies using the **Basic** or **Advanced Search** at the top right of items management.
3. Click the **Copies** tab and use the **Lock** icon  to unlock the copy records. Remember, copies are an extension of the title record; the **Copies** tab cannot be selected unless the main title record exists or is saved.
4. Next, click the **Add (+)** button at the bottom of the copy list to add a new copy.
5. Pay attention to all of the fields to provide copy specific information.
6. A **Barcode** is required to save your new copy; Alexandria will display the next copy barcode in shadow text, however; feel free to enter your desired barcode.
7. Click **Save**.

4 Duplicating Copies

The screenshot shows the Alexandria library system interface. The left sidebar contains navigation options: Dashboard, Circulation, Items, Patrons, Operations, Tools, Builder, and Preferences. The main area is titled 'Items Management' and shows details for 'The Lorax' by Dr. Seuss. The 'Copies' tab is active, displaying a table of copies. A context menu is open over the 'Barcode - Site' column, with 'Duplicate copy' selected. The main form shows the title 'The Lorax', author 'Dr. Seuss', and call number 'E SEU'. The status is 'Available', inventoried on 12/02/2014, and accessioned on 12/02/2014. The condition is 'Unknown'.

To duplicate copies:

1. Click on **Items** from the **Librarian sidenav**.
2. Locate the title of the copy you wish to duplicate and click on the **Copies** tab.
3. Click on the **Actions** icon  at the bottom of the copy list and select **Duplicate Copy**. The **Duplicate Copy** window will appear.
4. Fill in the **Beginning Barcode** field and enter the number of additional copies you wish to add in the **Number of Copies** field.
5. Click **Duplicate**.

5 Cataloging an eBook

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

To indicate an eBook for **Search** purposes, the eBook **Policy** preference must be set to **Show as ONLINE in Researcher**. Use the **Other** tab to link to item in your eBook vendors website.

CIRCULATION

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

1 Circulation Controls



The screenshot shows a software interface for the Circulation module. At the top left, the word "Circulation" is displayed. To its right is a blue button with a gear icon and the text "Actions". Below this, there is a dropdown menu currently showing "Check Out (.)" with a downward arrow. To the right of the dropdown is a large text input field with the placeholder text "Enter a command or barcode".

Circulation Modes

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

Command Line

Use the **Command Line** to input barcodes to perform the indicated Circulation Mode or look up items and patrons.

2 Locating a Patron by Name (L) or Item by Title (T)

To look up a patron by first OR last name:

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

To look up an item by title:

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

3 Circulation Modes

Checkout

The screenshot shows the Alexandria library system interface. The top navigation bar includes the Alexandria logo, a user profile for 'Hi, Demo COMPanion Demo', and an 'Actions' button. The left sidebar contains navigation options: Dashboard, Circulation (selected), Items, Patrons, Operations, Tools, Builder, and Preferences. The main content area is titled 'Circulation' and features a search bar with a dropdown menu set to 'Check Out (.)' and a text input field for commands or barcodes. Below the search bar, there are two main panels. The left panel displays the profile for patron 'Darla Anderson', including her name, ID (1001), contact information (Jones / Dibb), and statistics (4 items, 0 overdue, credit \$0.00). It also shows her student status (High Student, Grade 11), Lexile Score (1334 + SAT), and Reading Level (10.9). The right panel displays the profile for the item 'I was a rat!', including its ID (21762), title, genre (Fiction), Lexile Score (720), Accelerated Reader level (5.2), and status (Checked out). Below these panels is a table with tabs for 'Circulation (TL)', 'Items out (QE)', 'Holds (HH)', 'Reservations', 'Charges (F)', and 'Command help (?)'. The 'Circulation (TL)' tab is active, showing a transaction log with columns for 'Transaction log' and 'Homeroom (HW)'. The log contains four entries: two 'Out' transactions for 'I was a rat!' and 'Frankenstein', one 'Patron' entry for '1001 Anderson, Darla', and one 'Log In' entry for '11 Demo Demo'.

To check out an item:

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

Bookdrop Mode (B)

To check in a single item using Bookdrop Mode:

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

To check in multiple items using Bookdrop Mode:

With the circulation mode set to **Bookdrop**, scan or type the barcode of the item you want to check-in into the **Command Line**. If the barcode was typed, press **<enter>**. Repeat this step for each item.

Place a Hold on a Title (H)

To place a hold:

1. Make the patron requesting the hold the **Current Patron**.
2. Use the **Item Lookup** window to make the item being held the **Current Item**.
3. Type **H** (for **Hold**) and **=** (for the **Current Item**) (i.e. **H=**) and press **<enter>**. You may also type **H** and the barcode of the current item (e.g. **H 1234**). Repeat this step for each item.

Declaring a Copy Lost and Returning a Lost Copy

To declare an item lost:

1. Make the patron with the lost item(s) current by scanning or typing their patron barcode. If the barcode was typed, press **<enter>**.
2. Click on the **Items Out (QE)** tab.
3. Highlight the desired item(s).
4. Click on **Declare Lost**.
5. If you are sure you want to make the selected item(s) lost, click **Yes** on the dialog window that opens.
6. Complete the process in the **Lost Item Fee** window where you may forgive a portion or all of the charge, take a payment, and print or email a receipt.

Processing a found item:

1. Bookdrop the item, and when asked if you would like to process the lost item, click **Yes**.
2. Complete the process in the **Process Found Item** window by refunding previous payments, forgiving remaining lost fees, or charging an extra fee.
3. Once done, click **Process**.

Process found item ?

Forgive remaining charges and refund any payments for this previously lost item.

Darla Anderson
1001

For:
21924 Frankenstein

Send receipt

Print

Email

Refund options (\$0.00)

Method	Amount
Cash	\$
Forgive	\$
Charge extra fee	\$

Forgive remaining balance (\$20.00)

Refund note

Found item -- Lost fee forgiven

CANCEL PROCESS

Discarding Item Copies

To discard a single damaged item:

1. Select **Discard Mode** from the **Circulation Mode** dropdown menu or type **DM** in the **Command Line** and press **<enter>**. Select **Damaged** for the discard reason.
2. Scan or type the barcode for the damaged item to be discarded. The **Discarded Copies** patron will become the **Current Patron**.
3. Scan or enter the barcodes of all items you are discarding.
4. To exit discard mode, use the mode menu to go back to **Check Out** or use the **X** command to clear the current patron and item and reset back to **Check Out** mode.

4 Handling Charges and Fines

Charges include the end result of overdue fines, lost or damaged fees, and manually-charged amounts. Overdue fines continuously accumulate until items are returned. Once the item is returned, the fine becomes a charge.

The screenshot shows the Alexandria library system interface. The top navigation bar includes the Alexandria logo, a user profile for 'Hi, Demo COMPanion Demo', and an 'Actions' button. The left sidebar contains navigation options: Dashboard, Circulation, Items, Patrons, Operations, Tools, Builder, Preferences, Tips, and Read More. The main content area is titled 'Circulation' and features a search bar with a dropdown menu set to 'Check Out (.)' and a text input field for 'Enter a command or barcode'. Below the search bar, a profile card for 'Dan Sagaser' is displayed, showing details such as '1022 Haderlie / Plummer', 'High Student', 'Grade: 09', 'Lexile Score: 1227 SAT', 'Reading Level: 9.9', 'No Items Checked Out', 'Charges \$41.00', 'Credit \$0.00', and '3 Holds'. A 'No current item' message is shown to the right of the profile card. Below the profile card, there are buttons for 'DETAILS', 'LOOKUP', 'COPY LIST', 'STATS', and 'LOOKUP'. A tabbed interface is visible, with 'Charges (F)' selected. The 'Charges' tab contains a table with columns for 'Date', 'Type', 'Balance due (Amount - Paid|Forgiven)', and 'Charge note'. The table lists three charges: two 'Overdue Fine Was Due:01/25/2023' charges for \$0.50 each, and one 'Fee' charge for \$20.00. At the bottom of the charges table, there are buttons for 'CHARGE', 'MAKE PAYMENT', 'FORGIVE CHARGE', and 'PRINT CHARGES'.

Date	Type	Balance due (Amount - Paid Forgiven)	Charge note
01/30/2023 12:25 PM	Overdue Fine Was Due:01/25/2023	\$0.50 (\$0.50 - \$0.00)	11768 Prince Caspian
01/30/2023 12:25 PM	Fee	\$20.00 (\$20.00 - \$0.00)	11768 Prince Caspian
01/30/2023 12:23 PM	Overdue Fine Was Due:01/25/2023	\$0.50 (\$0.50 - \$0.00)	11215 Avalon High

The **Charges** tab has two subtabs used for managing money in your library:

- **Charges:** On this subtab, you manage current charges and fines. From here, you can manually charge the current patron, process payments, and forgive charges.
- **Payments:** On this subtab, you manage past payments and credits. This includes issuing refunds, adding credit, or refunding credit.

OPERATIONS

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

The screenshot shows the Alexandria Operations interface. On the left is a dark sidebar with navigation icons and labels: Dashboard, Circulation, Items, Patrons, Operations (highlighted), Tools, Builder, Preferences, Tips, and Read More. The top right of the main area shows the user 'Hi, Demo COMPAnion Demo' and an 'Actions' button. The main content area is titled 'Operations' and features a 'Filter' section with dropdowns for 'Show by type' (All types), 'From' (Today), and 'User / Site' (My Operations), along with a checkbox for 'Completed operations only'. Below the filter is a 'Run Operations' section with icons for Reports, Utilities, Export, and Import. The main list displays six operations, each with an icon, title, date, status, and action icons (email, info, download, PDF):

Icon	Title	Date	Status	Actions
	In-Stock Holds - Vaughan	01-30-2023 04:30:01 AM	Completed	Email, Info, Download, PDF
	Overdue Fines - Miner	01-30-2023 04:15:01 AM	Completed	Email, Info, Download, PDF
	Export Patrons - Middle Student	01-30-2023 04:10:00 AM	Completed	Email, Info, PDF
	Export Patrons - High Student	01-30-2023 04:05:02 AM	Completed	Email, Info, PDF
	Export Patrons - Elementary Student	01-30-2023 04:00:02 AM	Completed	Email, Info, PDF
	Overdue Items Posting List - Boyle	01-30-2023 04:00:02 AM	Completed	Email, Info, Download, PDF

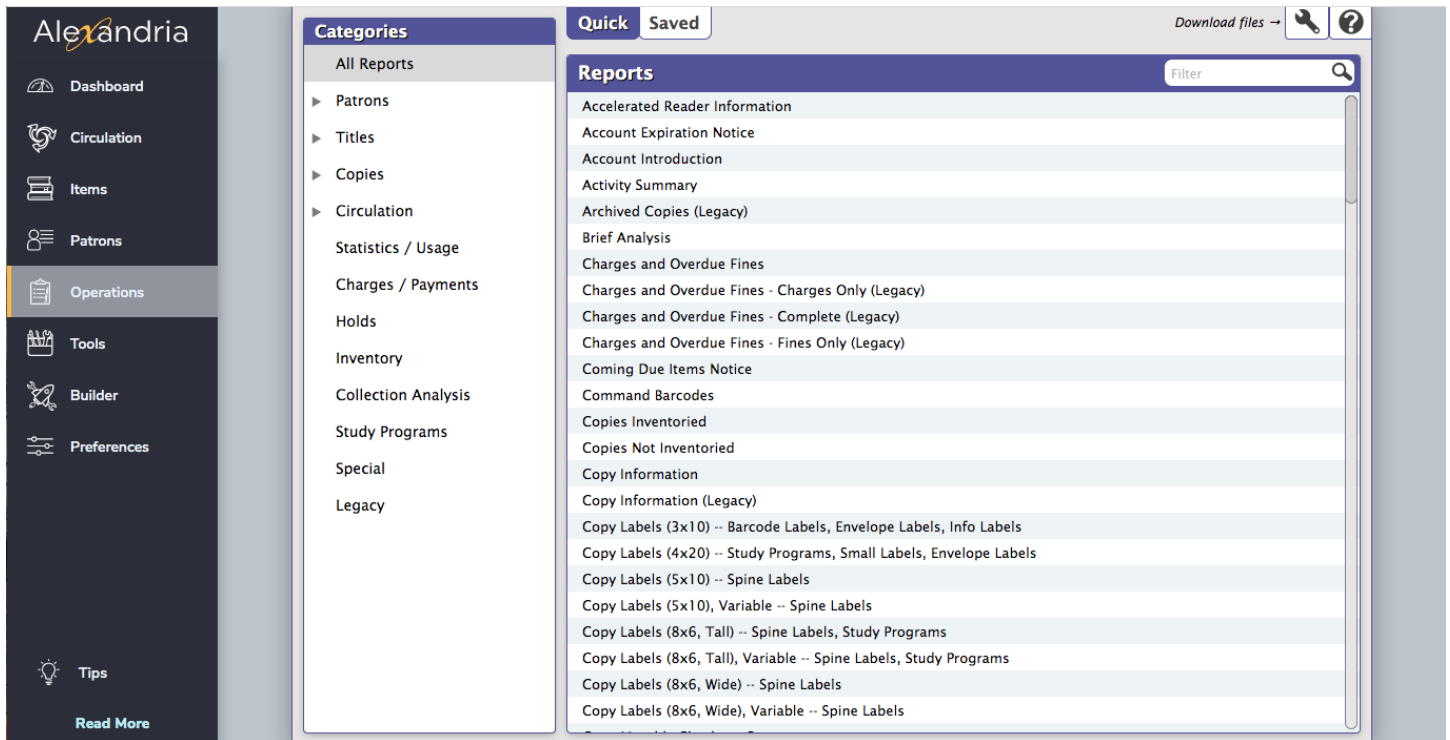
1 Reports

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

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



Check out the [Complete Reports List](#) to learn what each report does, what you can use it for, and what the outputs look like.



To create a new report:

1. Select **Operations**, then select **Reports**.
2. The **Filter** bar, in conjunction with the **Categories** pane, can be used to further filter the list of results in the Report Selection pane.
3. Click on the category and/or subcategory in the **Categories** pane to the left that is the best choice for the report you want to generate. You are able to expand or contract associate subcategories sections by clicking the icon located to the left of the category name ▶ .
4. Select the **Report** from the list and it is displayed to the right in the **Report Selection** pane. In the lower portion of the window, in the **Selections** and **Options** tab, you will choose the information you want in the report, along with its format.
5. Click **Run** in the bottom right corner of the window to queue the report in **Operation Management**. To print a hard copy of the report, click on the **Operations**. From here, you can select the report desired and click the PDF icon to view or save the report to your computer.
6. If the report generated meets your needs and you want to save the report settings for use in the future, click on **Create Saved Report** in the bottom right corner of the window.



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

Don't see a selection you like? Click **Show Additional Selections** at the bottom of the window to see more!

Label Reports

Copy Barcode Labels

The screenshot shows the Alexandria library system interface for configuring a 'Copy Barcode Labels' report. On the left is a navigation sidebar with categories like Dashboard, Circulation, Items, Patrons, Operations, Tools, Builder, and Preferences. The main area is divided into 'Categories' and 'Quick Saved' sections. The 'Categories' list includes 'All Reports', 'Patrons', 'Titles', 'Copies', 'Information', 'Labels', 'Special Status', 'Circulation', 'Statistics / Usage', 'Charges / Payments', 'Holds', 'Inventory', 'Collection Analysis', 'Study Programs', 'Special', and 'Legacy'. The 'Quick Saved' section contains a 'Reports' list with options like 'Copy Labels (3x10) -- Barcode Labels, Envelope Labels, Info Labels' and 'Copy Labels (4x20) -- Study Programs, Small Labels, Envelope Labels'. Below this is a 'Selections Options' panel with a description: 'Create labels with copy barcodes. This report is formatted for 3x10 label sheets (COMPanion Part Number V0055). Include records for:'. The configuration options include: 'Copies with a Status of' (Any), 'Copies with a Policy of' (Any Policy), 'Copies from' (Copy Location), 'Copies with a Medium of' (Any Medium), 'Copies in Call Number Range' (From/Through), 'Copies added' (From MM/DD/YYYY 13 Through MM/DD/YYYY 13), 'Copies from Title', and 'Copies in Barcode Range' (From/Through). At the bottom, there are buttons for 'Show Additional Selections', 'Create Saved Report', and 'Run'.

Patron Barcode Labels

The screenshot shows the Alexandria library system interface for configuring a 'Patron Barcode Labels' report. The layout is similar to the previous screenshot, with a navigation sidebar and a main configuration area. The 'Categories' list includes 'All Reports', 'Patrons', 'Information', 'Account', 'Labels', 'Forms', 'Reviews', 'Usage', 'Email', 'Titles', 'Copies', 'Circulation', 'Statistics / Usage', 'Charges / Payments', 'Holds', 'Inventory', 'Collection Analysis', and 'Study Programs'. The 'Quick Saved' section shows a 'Reports' list with options like 'Patron Barcode Labels (3x10)', 'Patron Labels (4x20)', and 'Patron Mailing Labels (3x10)'. The 'Selections Options' panel has a description: 'Create labels with patron barcodes. This report is formatted for 3x10 label sheets (COMPanion Part Number V0055). Include records for:'. The configuration options include: 'Patrons with a Status of' (Active), 'Patrons in Security Group' (Any Group), 'Patrons with a Policy of' (Any Policy), 'Patrons from' (Homeroom), 'Patrons in Grade' (From/Through), 'Patrons added' (From MM/DD/YYYY 13 Through MM/DD/YYYY 13), 'Patrons with Last Name', and 'Patrons in Barcode Range' (From/Through). At the bottom, there are buttons for 'Show Additional Selections', 'Create Saved Report', and 'Run'.

Circulation Information Reports

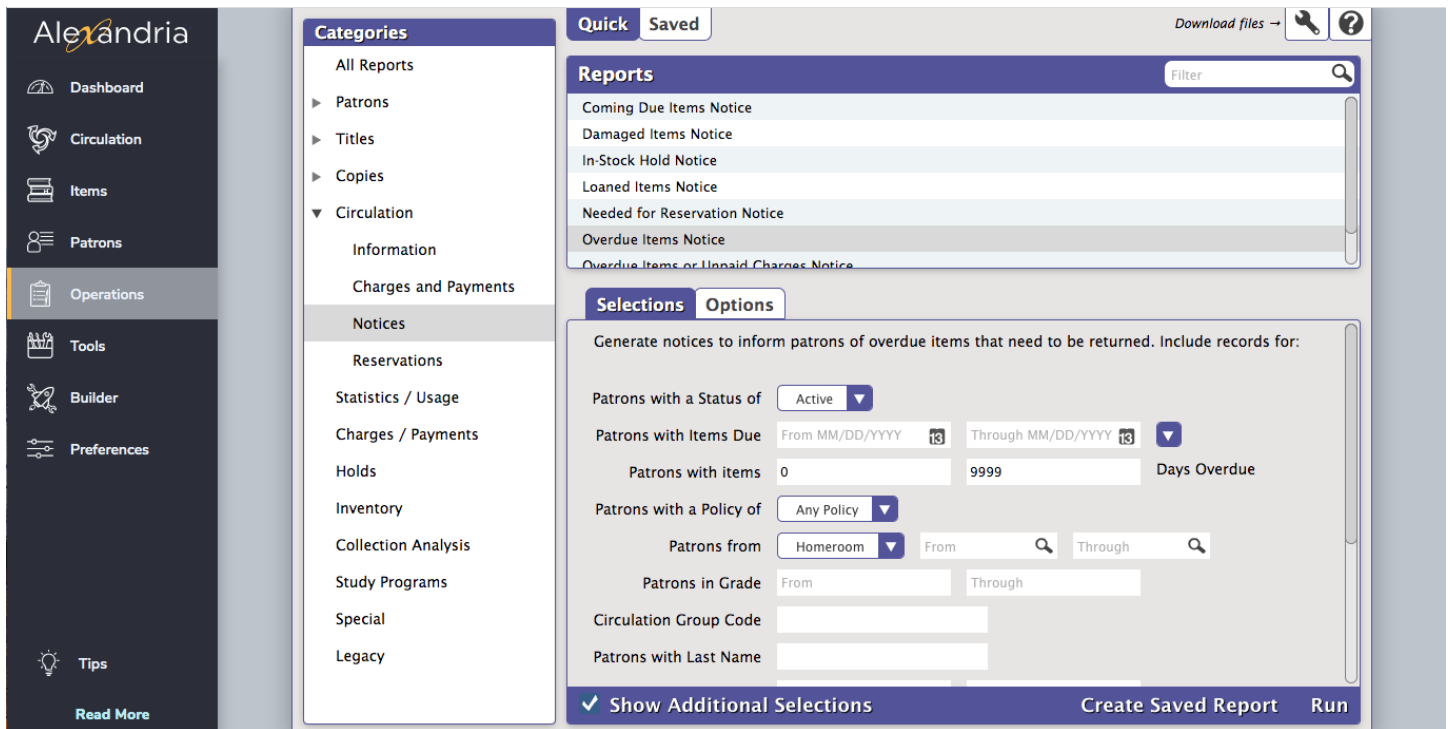
Loaned Items Information

The screenshot shows the Alexandria library system interface. On the left is a navigation menu with categories like Dashboard, Circulation, Items, Patrons, Operations, Tools, Builder, Preferences, and Tips. The main content area is titled 'Loaned Items Information' and includes a 'Categories' sidebar with options like All Reports, Patrons, Titles, Copies, Circulation, Information, Charges and Payments, Notices, Reservations, Statistics / Usage, Charges / Payments, Holds, Inventory, Collection Analysis, Study Programs, Special, and Legacy. The main panel has tabs for 'Quick' and 'Saved' reports, a 'Download files' button, and a search filter. Below this is a 'Reports' section with a list of report types: 'Loaned Items Information' (selected), 'Overdue Items Information', 'Overdue Items or Unpaid Charges Information', and 'Temporary Items Information'. A 'Selections' section allows filtering by 'Patrons with a Status of' (Active), 'Patrons with Items Borrowed' (date range), 'Patrons with Items Due' (date range), 'Patrons with a Policy of' (Any Policy), 'Copies with a Policy of' (Any Policy), 'Patrons from' (Homeroom), 'Patrons in Grade' (range), and 'Circulation Group Code'. At the bottom, there are buttons for 'Show Additional Selections', 'Create Saved Report', and 'Run'.

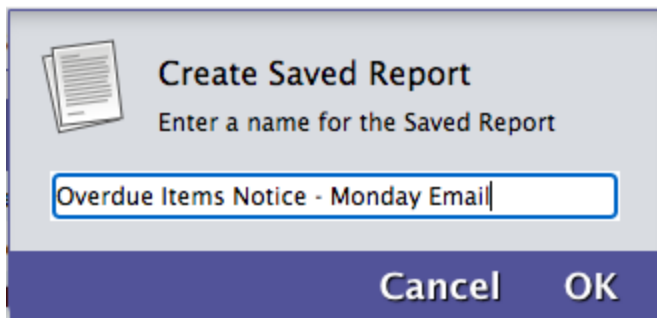
Overdue Items

The screenshot shows the Alexandria library system interface for the 'Overdue Items' report. The layout is similar to the 'Loaned Items Information' report. The 'Categories' sidebar is the same. The 'Reports' section lists 'Overdue Items Information' as the selected report. The 'Selections' section allows filtering by 'Patrons with a Status of' (Active), 'Patrons with Items Due' (date range), 'Patrons with items' (1 to 9999 Days Overdue), 'Patrons with a Policy of' (Any Policy), 'Patrons from' (Homeroom), 'Patrons in Grade' (range), 'Circulation Group Code', and 'Patrons with Last Name'. At the bottom, there are buttons for 'Show Additional Selections', 'Create Saved Report', and 'Run'.

Overdue Notice



Saving, Scheduling, and Sending Reports



Alexandria makes it easy to build your own frequently-used, custom reports. Once you create and save a report, you have the option to schedule the reports to run automatically.

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

1. Click **Reports** from **Operations** and choose **Circulation** from the **Categories** pane.
2. Choose **Notices** from the expanded dropdown list and then **Overdue Items Notice** from the **Report Selection** pane.
3. From the **Selections** tab, enter the selection criteria for the report including **Patron Status**, **Days Overdue**, **Patron Homeroom**, **Patron Grade**, and more.
4. Click **Create Saved Report**, name your saved report and click **OK**.
5. Your new saved report is now listed under the **Saved** tab. You will also notice additional tabs such as **Overview** and **Schedule**.
6. Click **Schedule**, unlock the report, and then click the **Schedule Report** checkbox.
7. Use the **Schedule** tab to select the **Frequency**, and the desired day and time the report will be run.
8. Click the **Notifications** tab and check the box to **Enable Email Notification**. Enter the email address of, for example, the homeroom teacher to the **Email Notification and Download Link To** field.
9. Click **Save** in the upper right-hand corner.

2 Utilities

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

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



Check out the [Complete Utilities List](#) to learn what each utility does, when you might use it, and what certain options do.

Removal Utilities

Remove Patron

The screenshot displays the Alexandria library system's interface for configuring the 'Remove Patron' utility. On the left is a dark sidebar with the 'Alexandria' logo and navigation icons for Dashboard, Circulation, Items, Patrons, Operations (highlighted), Tools, Builder, Preferences, and Tips. The main content area is divided into three panes. The 'Categories' pane on the left shows a tree view with 'Patrons' selected. The 'Utilities' pane in the center lists various utilities, with 'Remove Patrons' highlighted. The 'Options' pane on the right is titled 'Removes selected patron records from your database' and contains several configuration fields: 'Patrons with a Status of' (Active), 'Patrons in Security Group' (Patron (5)), 'Patrons with a Policy of' (Any Policy), 'Patrons from' (Homeroom), 'Patrons in Grade' (From and Through fields), 'Accounts Expiring On' (From and Through date fields), 'Patrons added' (From and Through date fields), and 'Graduation Date' (From and Through date fields). At the bottom of the utility configuration area, there are three buttons: 'Show Additional Selections' (checked), 'Create Saved Utility', and 'Run'. The top right of the utility pane includes a 'Download files' link and a help icon.

Remove Discarded Copies

The screenshot shows the Alexandria library system interface. On the left is a navigation sidebar with categories like Dashboard, Circulation, Items, Patrons, Operations, Tools, Builder, Preferences, and Tips. The main content area is titled 'Remove Discarded Copies' and includes a 'Utilities' list with options like 'Remove Discarded Copies'. Below this is a 'Selections' section with various filters: 'Copies with a Policy of' (Any Policy), 'Copies from' (Copy Location), 'Copies in Call Number Range' (From/Through), 'Copies Discarded' (From MM/DD/YYYY 13 Through MM/DD/YYYY 13), 'Discard Reason', 'Copies in Barcode Range' (From/Through), and 'Copies with Barcodes'. At the bottom, there are buttons for 'Show Additional Selections', 'Create Saved Utility', and 'Run'.

Remove Lost Copies

The screenshot shows the Alexandria library system interface for 'Remove Lost Copies'. The layout is identical to the 'Remove Discarded Copies' page, but the 'Selections' section is updated. The 'Copies Discarded' filter is replaced by 'Copies Lost' (From MM/DD/YYYY 13 Through MM/DD/YYYY 13). The 'Run' button at the bottom right is highlighted in blue.

3 Imports

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

Importing Patron Records

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

The screenshot displays the Alexandria software interface for importing patron records. The main window is titled 'Imports' and has tabs for 'Quick' and 'Saved'. The 'Quick' tab is active, showing a 'Choose File' button for 'Student Import' and a 'Field Mapping' button. Below this, a note states: 'All tab delimited format import files that do not have a header will require field mapping.'

The 'Settings' section is divided into three main areas:

- Import Settings:** Includes a checked checkbox for 'Skip First Record', a 'Defaults' section with dropdown menus for 'Site' (CDMP - COMPanion), 'Patron Policy' (Standard Patron), and 'Security Group' (Patron (3)), and a 'Patron Updates' section with radio buttons for 'Always Create New Records on Import' and 'Allow Import to Modify Existing Records'.
- Barcode Handling:** Includes a text field for 'Starting Patron Barcode' (1180001) and radio buttons for 'Assign new Barcodes', 'Use Barcodes in Import File' (selected), and 'Strip Leading Alpha Characters'.

A 'Patron Field Mapping' dialog box is overlaid on the main window. It contains a list of fields from the source file on the left and a list of fields in the Alexandria system on the right. Green checkmarks indicate that the following fields are mapped: First Name, Last Name, Barcode, Homeroom, Grade, Policy, Status, SSN, Middle Name, 2nd Location, Nickname, Student #, Site, Graduation Date, Address, Address 2, and City. The dialog box has 'Cancel' and 'Set' buttons at the bottom.

To import patron records:

1. Click **Operations** from the **Librarian sidenav** and select **Import**.
2. Click **Patrons** from the **Categories** pane.
3. Select **Allow Import to Modify Existing Records** in order to import current information into existing patron records.
4. If the import file includes barcode numbers for your patrons, select **Use Barcodes in Import File**. Otherwise, Alexandria will sequentially assign barcodes starting with the barcode number displayed in the **Starting Patron Barcode** field.
5. Browse and select the file to be added.
6. Click the **Field Mapping** button. In the **Field Mapping** window, match the fields in the import file with the appropriate fields in the patron record by clicking and dragging the fields on the left to match up horizontally with the fields to the right. Click **Set**.
7. Click on **Run** to queue the patron import.



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

To import patron pictures:

1. Go to the **Operations** and select **Import**.
2. Click on **Images** from the **Categories** pane.
3. Select **Patron Pictures** from the options on the **Settings** tab.
4. Browse and select the folder containing the picture files.
5. Click **Run**. The import will be queued in **Operation Management**.



The file needs to be zipped and 50 MB or smaller. If the file is larger than 50 MB, schedule an FTP import on the **Saved** tab. For best results, images should be approximately 186 x 240 pixels in size and either .jpg or .png in format.

Importing Items

Categories

- Patrons
- Items**
- Textbooks
- Circulation Groups
- Images
- Special

Quick **Saved**

Imports

Choose File E Mackin.502559.001

Field Mapping

All tab delimited format import files that do not have a header will require field mapping.

Settings **Options**

Import Settings

- Add or Update Titles & Copies
- Add Titles & Copies
- Add or Update Titles
- Add Titles
- Update Copies
- Add or Update Copies for Matching Titles
- Always add at least one Copy

Title Update Matching ISBN OR LCCN

Before Importing

- Skip First Record if Field Mapping

Barcode Handling

The following selection determines whether barcodes in the import file will be retained or reassigned starting with the barcode shown in the field below.

Starting Item Barcode 1300000

- Always Assign New Barcodes
- Never Reassign Barcodes
- Reassign Only Duplicate Barcodes
- Remove Leading Alpha Characters

Create Saved Import Run

To import item records from a vendor file:

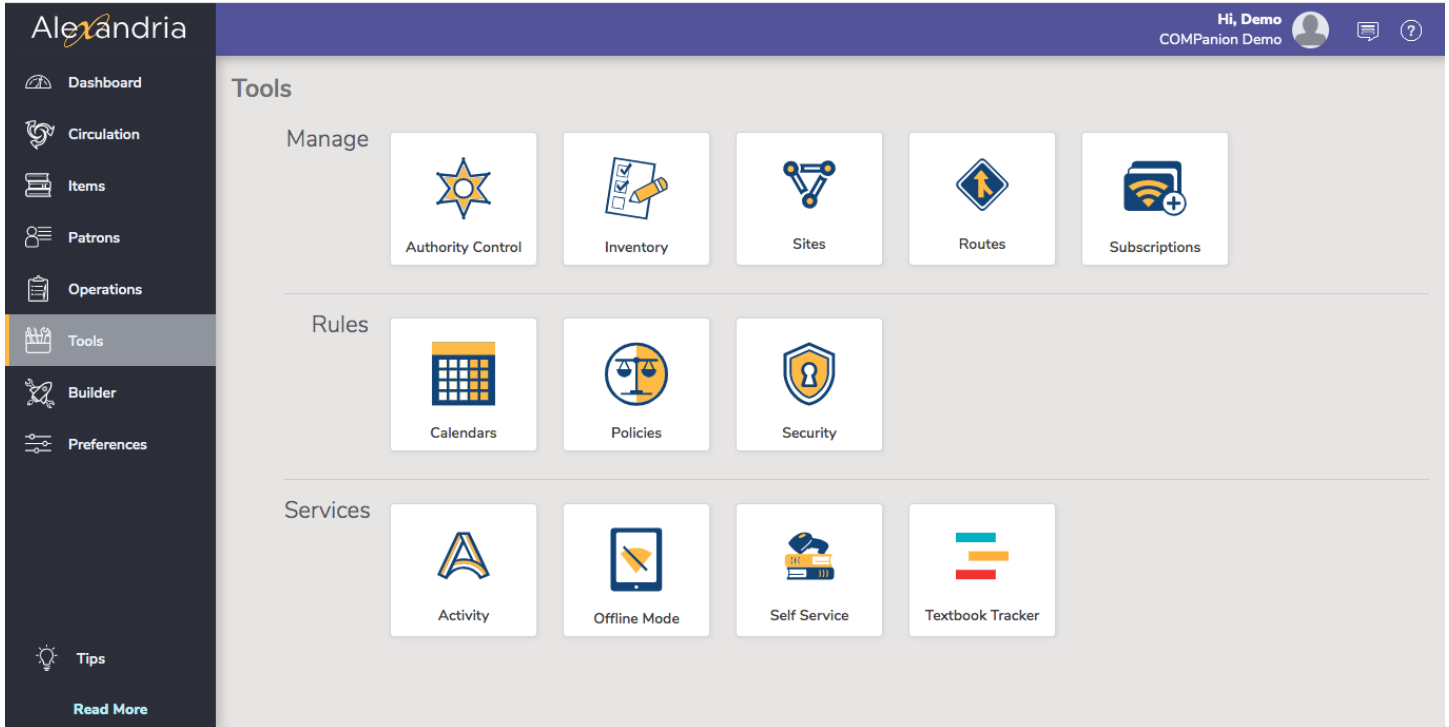
1. Go to **Operations** and select **Import**.
2. Click the **Items** category in the **Categories** pane.
3. Use the **Settings** tab to set your selections for the item import. When importing item records for eBooks from a vendor, select **Import Titles Only** from the **Import Settings** section.
4. Use the **Choose File** button to find and select the file to be added.
5. Click on **Run** to queue the item import.



If you would like to run an archive before making mass changes to the database, for example, when running utilities or imports, please run the **Database Archive** utility (**Tools > Utilities > Database**).

TOOLS

Tools contains convenient shortcuts to a wide range of program and management tools that perform a variety of tasks.



1 Policies

POLICIES

Patron Policies establish circulation privileges for patrons, while the rules for circulating various types of items are established within the **Item Policies**. For example, you can set policies that allow tenth graders to check items out for longer periods of time than second graders; the borrowing period for reference items can be set for one day, while fiction and nonfiction works can be set for two weeks, etc.



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

The screenshot displays the Alexandria library management system interface. On the left is a dark sidebar with navigation options: Dashboard, Circulation, Items, Patrons, Operations, Tools (highlighted), Builder, Preferences, and Tips. The main content area is titled 'COMPanion Demo' and shows two side-by-side configuration panels under the 'Exceptions' tab. The left panel is for 'Patron Policy' (Elementary Student) and includes fields for 'Patron Policy Short Code' (STD), 'Alert When Charges Exceed' (\$25.00), 'Maximum Loaned Items' (5), 'Items Are Due On' (Any day), 'Use Calendar' (Standard), 'Apply Period Due Dates' (checked), and 'Statistics Group' (Elementary St...). The right panel is for 'Item Policy' (Biography) and includes fields for 'Item Policy Short Code' (BIO), 'Loan Fee' (\$0.00), 'Default Replacement / Purchase Cost' (\$20.00), 'Maximum Renewals for Item' (1), 'Hard Due Date' (mm/dd/yyyy), 'Statistics Group' (Biography), and 'Transaction Period' (14 Days). Both panels have 'Add', 'Remove', 'Duplicate', and 'Rename' buttons at the bottom.

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

2 Security

SECURITY

Security preferences allow operators (with the appropriate authority) to modify security groups by manipulating lists of permissions. Using the dropdown menus contained in each tab, you can enable or disable specific security privileges for the selected security group.

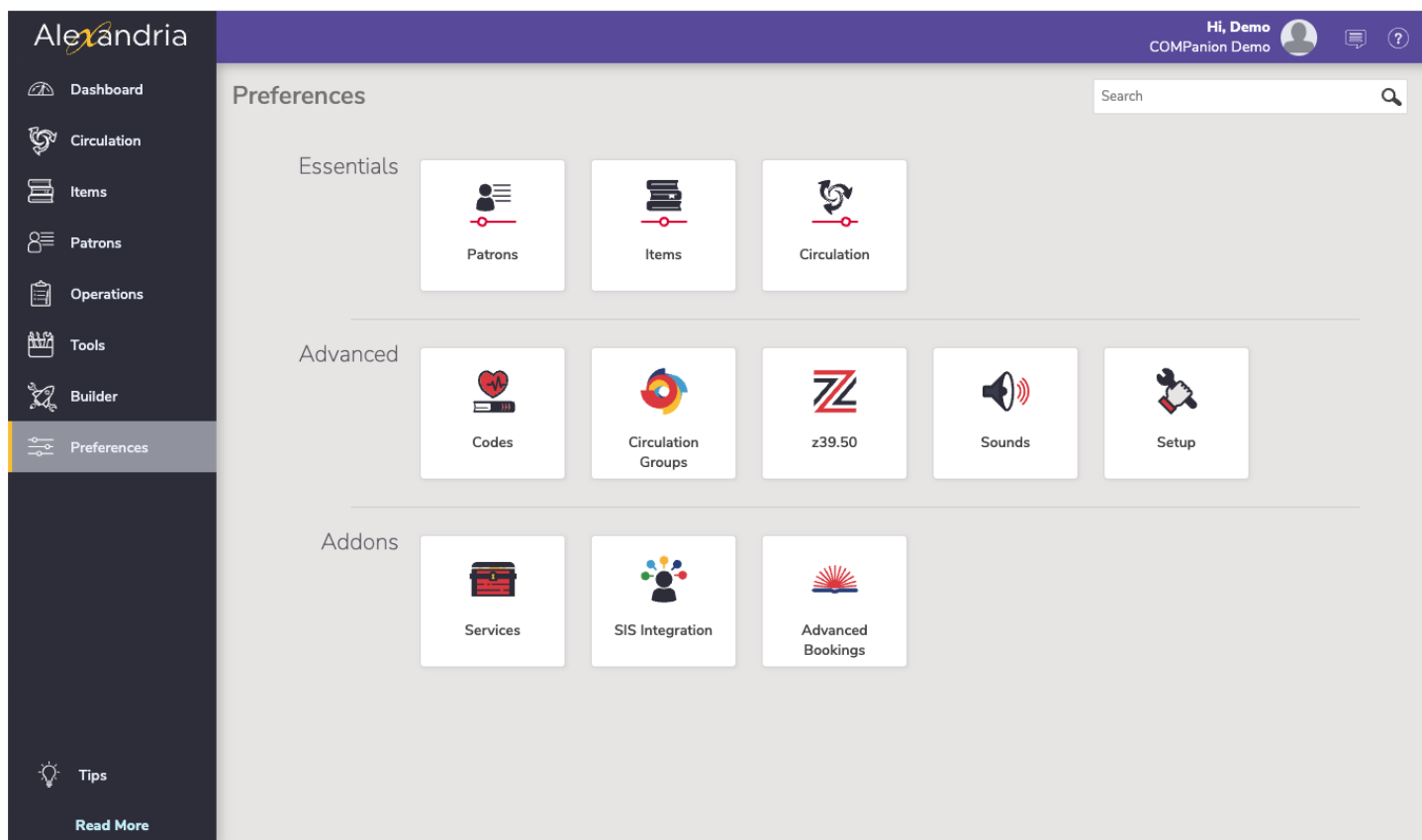
These settings define what a user assigned to this security group will have access to. Settings are listed top to bottom from least to most access.

The screenshot displays the Alexandria library system interface. On the left is a dark sidebar with navigation options: Dashboard, Circulation, Items, Patrons, Operations, Tools (highlighted), Builder, Preferences, Tips, and Read More. The main content area is titled 'COMPanion Demo' and features a 'Show All' button and a 'SYSTEM - A/TT' indicator. Below this is a 'Security Groups' list with the following items: District Administrator (0), Library Administrator (1), Textbook Administrator (1), Librarian (2), Textbook Manager (2), Library Staff (3), Library Aide (4), Bulletin Board Manager (5), Patron (5), Patron Limited (5), Self-Service (5), and Student Aide (5). To the right of the list is a 'Management' tab with a dropdown menu. Below the tabs is a list of settings, each with a dropdown menu:

- Advanced Bookings: Perform
- Data Station Management: Update
- Security Level: 1 - Administrator
- Patrons: Import, Export and Utilities
- Patron Passwords: Edit
- System Patron: Use
- Library Items: Import, Export and Utilities
- Library Copies: Remove
- Textbook Items: No Access
- Textbook Copies: View
- Routes: Import, Export and Utilities
- Subscriptions: Import, Export and Utilities

PREFERENCES

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



PATRONS

Patron Defaults

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

Patron Rules

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

The screenshot shows the 'Preferences - Patrons' interface. The left sidebar includes 'Dashboard', 'Circulation', 'Items', 'Patrons', 'Operations', 'Tools', 'Builder', 'Preferences', and 'Tips'. The main content area is titled 'Preferences - Patrons' and includes a sub-menu with 'Patron Defaults', 'Patron Rules', 'Patron Pictures', 'Grade Table', and 'Lexile'. The 'Patron Defaults' section is active, showing the following settings:

- Barcode:** A text field for assigning barcodes to new patrons.
- Next Barcode:** A text field containing the value '1100001'.
- Policy:** A dropdown menu set to 'Standard Patron'.
- Security:** A dropdown menu set to 'Patron (5)'.

Patron Pictures

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

Grade Table

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



Make sure the grades entered in the Grade Table and Patrons Management are the exact same. For example, if the grades in Patrons Management show as 01, 02, 03, and so on, then the grades in the Grade Table should show as 01, 02, 03, etc.

Lexile

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

ITEMS

Item Defaults

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

The screenshot shows the 'Preferences - Items' configuration page in the Alexandria system. The 'Item Defaults' tab is active, showing settings for new items. The 'Barcode' section has a 'Next Barcode *' field set to 1300000. The 'Policy & Medium' section has 'Default Policy' set to 'Standard Item' and 'Default Medium' set to 'book'.

Policy Mapping

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

Temporary Items

Use these settings to establish a “temporary item” barcode range. Any item loaned using a temporary item barcode number is considered a “temporary” check out—but only if that number hasn't been previously assigned to a patron or an item.

Call Numbers

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

Cover Art

Titles without cover art show these default images based on medium. Turn on **Automatically Retrieve Cover Art During Idle Periods** if you want Alexandria to find cover art for you (using ISBN to match).

CIRCULATION

User Interaction

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

The screenshot displays the 'Preferences - Circulation' interface. On the left is a navigation menu with options like Dashboard, Circulation, Items, Patrons, Operations, Tools, Builder, Preferences, and Tips. The main content area is titled 'Preferences - Circulation' and includes a sub-menu with 'User Interaction', 'Circulation Rules', 'Receipt Content', 'Print Settings', 'Letters', and 'Circulation Settings'. The 'User Interaction' section is active, showing instructions to 'Set interaction rules for when you are in Circulation, and choose which additional information you want to see.' It is divided into 'Behavior' and 'Alerts' sections. Under 'Behavior', there is a 'Check Out' dropdown menu currently showing 'Allow check in with confirmatio...', and a checkbox for 'Hide overdue payment windows in Bookdrop mode'. Under 'Alerts', there is an 'Alert for Copies from Different Sites' dropdown set to 'Never', and three checkboxes: 'Show patron alerts on overdue items', 'Show patron alerts on in-stock holds', and 'Show patron alerts for upcoming reservations'.

Circulation Rules

Configure general circulation settings for holds and reservations.

Receipt Content

If you print receipts for patrons at your site, these preferences allow you to customize the information printed on your receipts; this information applies whether you print an 8.5"x 11" receipt from a local or network printer or a 3" receipt from one of COMPanion's Receipt Printers.

Print Settings

These preferences activate the COMPanion Network Receipt Printer, which provide convenient and economical means of printing receipts for common circulation transactions such as check outs, placed holds, fines, fees, payments, and refunds.

Letters

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

Circulation Settings

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

Z39.50

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

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

Alexandria Hi, Demo COMPanion Demo SYSTEM-A

Preferences - z39.50

Configure your own sets of z39.50 servers to match the quality and type of records in your collection. You can choose any of these sets when you employ Title Assistant in Items Management to add or augment your records. Alexandria will then use the chosen set to search for potential MARC record matches in remote library collections.

z39.50 Sets	
COMPanion Default Set	▼ 🔒

Filter Servers 🔍

Servers	
DC - Special - Library of Congress	lx2.loc.gov
OH - Special - OhioLINK	olc1.ohiolink.edu

+ - ⬆ ⬇ ⬅ ADD TO SET ➕ ⚙

RESEARCHER



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

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

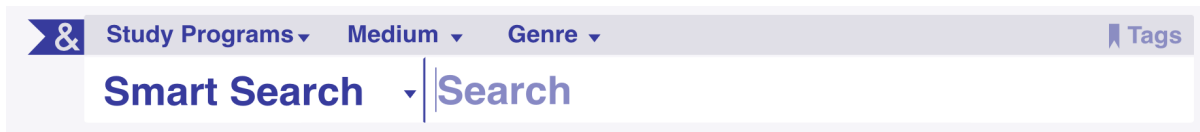
1 Search

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

SEARCH PANE

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

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



Study Programs

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

All Mediums

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

Genre

You can choose to search All Genres or Select a Genre.

Tags

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

Performing a Search

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

Results

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

2 Scout

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

The screenshot shows the Scout search interface. At the top, there are navigation icons (a rocket, a list, and a pin) on the left, and user information 'Hi, guest' and 'COMPanion DC Training' on the right, along with 'log in' and a help icon. A search bar contains the text 'Pirates' with a close button. Below the search bar is a decorative illustration of a paper boat on blue waves. The search results are displayed in four columns, each with a book cover and a title below it. The first result is 'Pirates' by Will Osborne and Mary Pope Osborne, featuring a skull and crossbones. The second result is 'Pirates Don't Change Diapers' by Malinda Long and David Shannon, featuring a baby in a diaper. The third result is 'Pirates! : the true' by Tessa Rees, featuring a close-up of a woman's face. The fourth result is 'How I became a pirate' by Malinda Long and David Shannon, featuring a cartoon pirate. A white checkmark is positioned below the second result.

Hi, guest
COMPanion DC Training log in ?

Pirates

MAGIC TREE HOUSE
FACT TRACKER
Pirates
Will Osborne and Mary Pope Osborne

Pirates Don't Change Diapers
Malinda Long David Shannon

Pirates!
Tessa Rees

How I Became a Pirate
Malinda Long David Shannon

Pirates
Pirates don't change diapers
Pirates! : the true
How I became a pirate

3 Explore

Explore is a visually engaging graphical interface that uses large, clickable icons to locate items in your collection. Customize Explore with [Explore Builder](#).



EXPLORE PANES

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

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

4 Bulletins

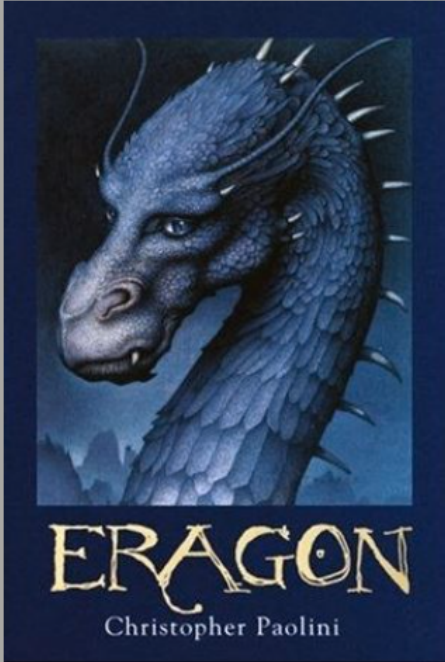
Hi, guest
COMPanion DC Training

log in

Featured Reading

Back to bulletins home

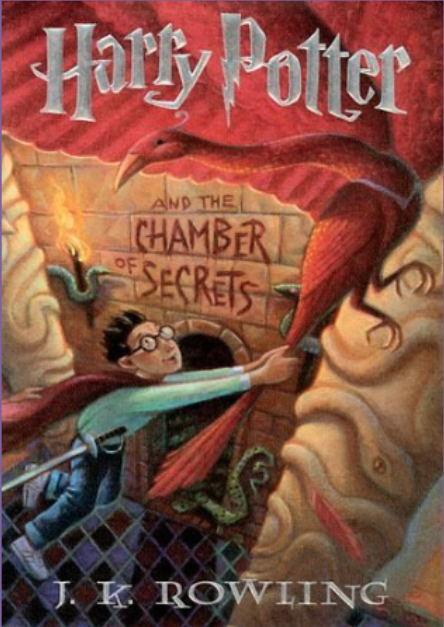
Eragon



ERAGON
Christopher Paolini

In Aagaesia, a fifteen-year-old boy of unknown lineage called Eragon finds a mysterious stone that weaves his life into an intricate tapestry of destiny, magic, and power, peopled with dragons, elves, and monsters.

Harry Potter and the Chamber of Secrets



Harry Potter
AND THE
CHAMBER
OF SECRETS
J. K. ROWLING

The Dursleys were so mean that hideous that summer that all Harry Potter wanted was to get back to the Hogwarts School for Witchcraft and Wizardry. But just as he's packing his bags, Harry receives a warning from a strange, impish creature named Dobby who says that if Harry Potter returns to Hogwarts, disaster will strike.

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

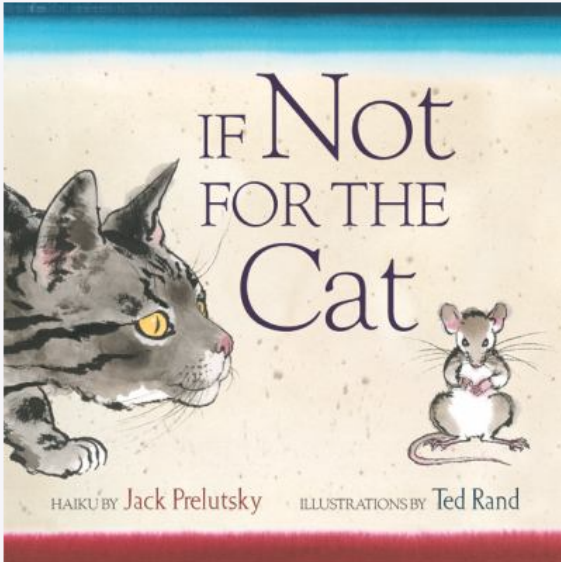
Create notices for your library, student-based clubs, and upcoming school events; these bulletins can contain both text and images. Bulletins may also contain links to outside reading lists or anything with an associated URL; these optional URLs will open in a new browser tab/window.

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

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

5 Slideshow

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



811 PRE

★★★★★ (5 reviews)

If not for the cat

Prelutsky, Jack

Haiku-like poems describe a variety of animals.

6 Browse

Get your patrons excited to view your catalog by using Alexandria's **Browse** feature.

Browse is an engaging way to display your items in a shelf view, no searching required! Patrons can choose the highlighted items by using one of four options. **Browse by Newest** is where patrons can view up to 50 of the most recently added titles to your library that have been added in the last 180 days. **Highest Rated** will display up to 50 of your library's highest-rated items, sorted by the highest average rating. Selecting **Genre** allows patrons to choose up to 10 different genres to view at a time and will sort the items in **Title Call Number** order. Lastly, browsing by **Study Program** shows items that fall within the selected study program range.

The screenshot displays the 'Browse by Newest' section of a library catalog interface. At the top, there is a navigation bar with icons for home, search, and a user profile. The user profile shows 'Hi, guest COMPanion DC Training' and a 'log in' button. Below the navigation bar, the 'Browse by Newest' section is active, showing a grid of 18 book covers arranged in three rows of six. The books displayed are:

- Row 1: *All Thirteen* by Christina Soontornvat, *Everlyn Dellaby* by Kelly Murphy, *Fat Chance, Charlie Vega* by Christina Soontornvat, *Fresh* by Heidi Pitlor, *Girl Motorcycle* by Jennifer Niven, *The Big Book of Experiments* by Dr. Kate Birrdorf.
- Row 2: *Last Night at the Telegraph Club* by Malinda Lo, *Once Upon an Eid* by F.K. Ayub, *Orwell's Roses* by Rebecca Solnit, *The Paper Boat* by Thao Lam, *Raybearer* by Jordan Iyuke, *Scientist: E. O. Wilson: A Life in Nature* by Richard Rhodes.
- Row 3: *Six Crimson Cranes* by Elizabeth Lim, *Soul Riders* by David Almond, *Explorer Academy: Star Dances* by Sara Pennypacker, *Twins* by Fran Man, *Amari* by B.B. Alston, *The Goblin Emperor* by Katherine Arden.

Enjoy Alexandria!

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

1 (800) 347-4942 | support@goalexandria.com

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