

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, Tools, and Researcher. Within each section, an overview of basic "how-to's" will be covered.

It is not the purpose of this document to 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 **Preferences** from the Alexandria Librarian interface, and click on **Security** in the **Configuration** category.
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 Alexandria Librarian.
2. Click on the **Add (+)** at the bottom of the left frame if you are adding the person. If the person is already in the system, search for the patron using the **Find** icon .
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 each Alexandria module, you will see the **Help** icon . Clicking this icon will open the help 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 Center** icon  to open the Message Center and display a list of your notifications; when you have unread notifications or new messages are available, a red dot appears on the Message Center icon .

4 Tip of the Week

[Tip of the Week](#) features a new tip for using Alexandria each week. The Tip of the Week archives are a collection of past tips that can help you run Alexandria more smoothly. You may 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 your Circulation window. Emailing from the program not only sends your message or question to Customer Support, but also informs them about your machine, its hardware, memory, your data, and the version of Alexandria you are running.

To email Customer Support:

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



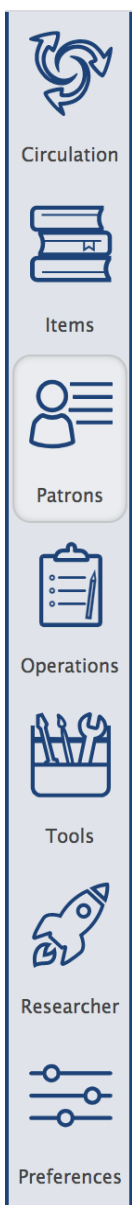
In order to email Customer Support from your **Circulation** window, you must have a return email specified in **Sites Management** (accessed from **Tools**) and your **Email Preferences** (accessed from **Preferences > Setup**) entered correctly.

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**, **Bulletins**), check **Data Station** status reports (e.g. system analysis, database statistics, and change your **Data Station Preferences**).

1 Librarian Sidenav

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



PATRONS

1 Adding Patrons Manually

The screenshot shows the 'Patrons' manual entry form. The sidebar on the left contains icons for Circulation, Items, Patrons, Operations, Tools, and Researcher, with a Preferences section at the bottom. The main area has tabs for Personal, Contact, Access, Notes, Statistics, and Programs. The Personal tab is active, showing fields for First Name, Nickname, Middle Name, Last Name, Barcode (Auto), Policy (Standard Patron), Sex (Unspecified), Site (COMP - COMPanio...), Location, 2nd Location, Patron #, SSN, Grade, Birthdate (mm/dd/yyyy), Optional Date (mm/dd/yyyy), and Account Exp (disabled). There are also dropdown menus for Status (Active) and a date field for Susp. End Date (mm/dd/yyyy). Buttons for Revert, Save, and a help icon are in the top right.



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. The **Patrons** window will appear. Click the **Add (+)** button near the bottom left 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

The screenshot shows a web-based interface for managing patron records. On the left is a sidebar with navigation icons for Circulation, Items, Patrons, Operations, Tools, Researcher, and Preferences. The main area is divided into a left pane showing a list of patron names (Anderson, Darla and Anderson, Dustin) and a right pane for editing a selected patron's record. The right pane has tabs for Personal, Contact, Access, Notes, Statistics, and Programs. The Personal tab is active, showing fields for First Name (Darla), Nickname, Middle Name, Last Name (Anderson), Barcode (1001), Policy (High Student), Sex (Female), Site (COMP - COMPanio...), Location (Jones), 2nd Location (Dibb), Patron # (1001), SSN, Grade (12), Birthdate (mm/dd/yyyy), Optional Date (mm/dd/yyyy), and Account Exp (disabled). A photo of a young woman is displayed on the right side of the form. The Status is set to Active, and the Susp. End Date is mm/dd/yyyy. A lock icon is visible at the top of the form area.

To modify a patron record:

1. Click on the **Patrons** module from the **Librarian sidenav**.
2. Click the **Find** icon  at the bottom of the left pane. The **Patron Lookup** will open.
3. Type in the patron's last name or any pertinent field and press **<enter>**. Then select the desired patron from the list in the left pane.
4. Unlock the patron's record by clicking on the **Lock** icon .
5. 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. Click on the **Actions Menu**  and select **Remove Patron**.



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

ITEMS


1 Finding Items

The screenshot shows a web application interface for finding items. On the left is a vertical sidebar with icons for Circulation, Items, Patrons, Operations, Tools, Researcher, and Preferences. The main area is a search form titled "Title" with a dropdown arrow. The form includes the following fields and options:

- Title:
- Author:
- Title/Copy Call Number: From Through
- Barcode: From Through
- Lexile: From Through
- Copies Added: From mm/dd/yyyy Through mm/dd/yyyy
- ISBN/LCCN:
- Site:
- Title/Copy Policy:
- Title Notes:
- Add to current results

At the bottom of the form are buttons for "Clear", "Cancel", and "Search". Below the form are two buttons: "View recently added" and "View recently modified".

To find an item record:

1. Click on the **Items** icon from the **Librarian sidenav**. **Items Management** will open.
2. Click **Search for Titles**, or click the **Find** icon  in the bottom left hand corner.
3. Your results will be listed in the left pane.

2 Adding and Cataloging Titles

The screenshot displays two overlapping windows from a library cataloging system. The top window is a search results pane titled 'Title' with columns for Title, Medium, and Location. It lists several records for 'Harry Potter and the Half-Blood Prince' with varying media and locations. Below the list is a search summary: 'Searching... 31 seconds, 3 of 4 databases examined'. The bottom window is the 'SmartMARC® Title Assistant' for 'Harry Potter and the Half-Blood Prince'. It features tabs for 'Publication', 'Subjects', 'Terms', 'Notes', 'Other', and 'Programs'. The 'Publication' tab is active, showing fields for Non-Filing, Title, Author, Call Number, ISBN/ISSN, Place, Publisher, Year, and Extent. A small image of the book cover is visible on the right. The interface includes a sidebar with navigation icons and a top navigation bar.

To add a new title record to your database:

1. Click on **Items** from the **Librarian sidenav**.
2. The **Items Management** module will appear.
3. Next, click on the **Add (+)** button located near the bottom of the Items pane.
4. The **SmartMARC® Title Assistant** will open allowing you to add a new title record. (Press **<enter>** here to add a blank record.)
5. Enter the **ISBN** or **Title/Author** in the **Title Assistant** window and click **Search**.
6. Click and highlight to preview the MARC record you like best and click **Continue**.
7. Modify the **Call Number**, update any necessary fields, and select the proper **Policy** for the item from the **Policy** dropdown menu.
8. 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.

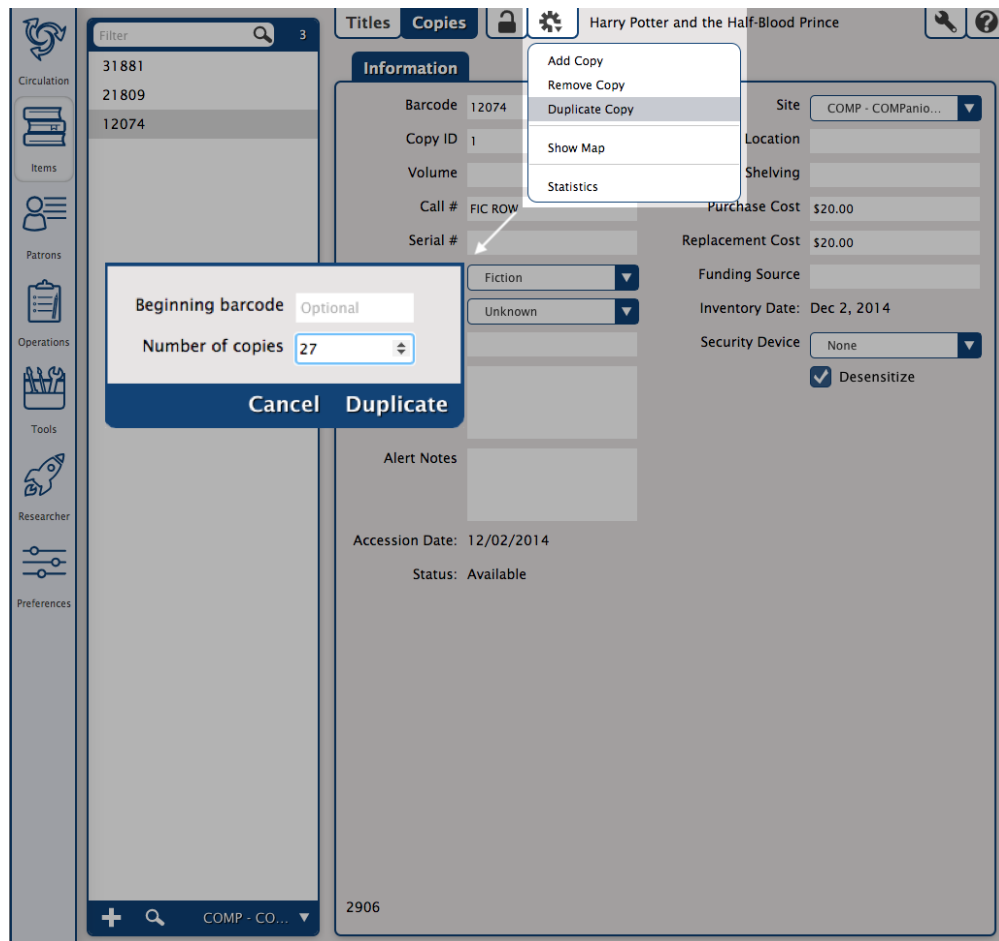
3 Adding New Copies

The screenshot displays the 'Copies' tab for a title record. The left sidebar contains navigation icons for Circulation, Items, Patrons, Operations, Tools, Researcher, and Preferences. The main area shows a list of items with IDs 31881, 21809, and 12074. The 'Copies' tab is active, displaying an 'Information' form with fields for Barcode (Auto), Copy ID, Volume, Call #, Serial #, Policy (Fiction), Condition (Unknown), Vendor, Copy Notes, Alert Notes, Accession Date, Status (Available), Site (COMP - COMPanio...), Copy Location, Copy Shelving, Purchase Cost, Replacement Cost, Funding Source, Inventory Date (Never), Security Device (None), and a Desensitize checkbox. The title 'Harry Potter and the Half-B...' is visible at the top.


To add a new copy to the title record:

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

4 Duplicating Copies



To duplicate copies:

1. Click on **Items** from the **Librarian sidenav**. **Items Management** will appear.
2. Open the **Item Record** and click on the **Copies** tab.
3. Click on the **Actions** icon  next to the lock icon 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

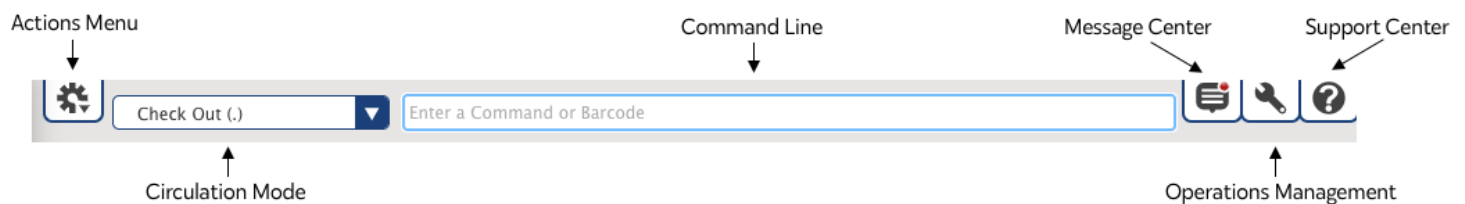
When cataloging an eBook, remember that only **Titles** are added, not copies, because they are not physically barcoded items.

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

CIRCULATION

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

1 Circulation Controls



Circulation Modes

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

Command Line

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

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

To look up a patron by last name:

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 COMPanion DC Demo interface. At the top, there is a search bar with the text 'Check Out (.)' and 'Enter a Command or Barcode'. Below the search bar, there are two panels. The left panel is for 'Mark Arias', showing '1002 Jones / Dibb High Student', '2 Items, 0 Overdue', 'Lexile Score: 1369 + SAT', and 'Reading Level: 11.3'. The right panel is for 'Cave sleuths', showing '20129 551.44 LIN Non-Fiction', 'Checked out', '1 of 2 copies available', 'Unknown', 'Replacement Cost: \$20.00', 'Lexile Score: 1220', and 'Accelerated Reader: 8.5'. Below these panels is a 'Transaction Log' table with columns 'Transaction Log' and 'Location (HW)'. The table contains the following data:

Transaction Log	Location (HW)
Out 20129 'Cave sleuths', to Patron: 1002	Due: Oct 8, 2020
Out 31676 'Judy Moody, around the world in 8 1/2 days', to Patron: 1002	Due: Oct 8, 2020
Patron 1002 Arias, Mark	09/24/2020 12:02 PM
Out 31778 'Wonder', to Patron: 1001	Due: Oct 8, 2020
Patron 1001 Anderson, Darla	09/24/2020 12:02 PM

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.

To return a Lost Item and provide a refund:

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

Charged to: 1001 Darla Anderson

Item: 31888 Anastasia, the last Gran...

Lost Fee Charged: \$20.00	
Forgiven: \$0.00	
Previous Payments: \$20.00	
Previous Refunds: \$0.00	
Refund Previous Payments to Credit	<input type="text" value="\$20.00"/>
Remaining Lost Fee: \$0.00	
Forgive Remaining Lost Fee	<input type="text" value="\$0.00"/>
Charge Extra Fee	<input type="text"/>

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 a reason for the discard.
2. Scan or type the barcode for the damaged item to be discarded. The **Discarded Copies** patron will become the **Current Patron**.

3. In the **Discarded Fee** window, you may forgive the charge, enter a payment amount, and process it with or without a receipt.

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 **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.

TOOLS

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

1 Reports

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

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


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

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



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 **Tools**, 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 **Operation Management** icon , which will open the **Operation Management** window. From here, you can select the report desired and click the PDF icon to view or save the report to your computer.
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

The screenshot shows the 'Copy' label report configuration interface. On the left is a 'Categories' sidebar with 'Copies' selected. The main area has 'Quick' and 'Saved' tabs. The 'Reports' section lists various label types, with 'Copy Labels (3x10) -- Barcode Labels, Envelope Labels, Info Labels' selected. Below, the 'Selections' tab is active, showing filters for 'Copies with a Status of' (Any), 'Copies with a Policy of' (Any Policy), 'Copies from' (Copy Location), 'Copies with a Medium of' (Any Medium), 'Copies in Call Number Range', 'Copies added' (MM/DD/YYYY), 'Copies from Title', and 'Copies in Barcode Range'. At the bottom, there are buttons for 'Show Additional Selections', 'Create Saved Report', and 'Run'.

Patron

The screenshot shows the 'Patron' label report configuration interface. On the left is a 'Categories' sidebar with 'Patrons' selected. The main area has 'Quick' and 'Saved' tabs. The 'Reports' section lists 'Patron Barcode Labels (3x10)', 'Patron Labels (4x20)', and 'Patron Mailing Labels (3x10)'. Below, the 'Selections' tab is active, showing filters for 'Patrons with a Status of' (Active), 'Patrons in Security Group' (Any Group), 'Patrons with a Policy of' (Any Policy), 'Patrons from' (Location), 'Patrons in Grade', 'Patrons added' (MM/DD/YYYY), 'Patrons with Last Name', and 'Patrons in Barcode Range'. At the bottom, there are buttons for 'Show Additional Selections', 'Create Saved Report', and 'Run'.

Overdue Items

Categories

- All Reports
- ▶ Patrons
- ▶ Titles
- ▶ Copies
- ▼ Circulation
 - Information
 - Charges and Payments
 - Notices
 - Reservations
 - Statistics / Usage
 - Charges / Payments
 - Holds
 - Inventory
 - Collection Analysis
 - Study Programs
 - Interlibrary Loans
 - Special
 - Legacy

Quick **Saved**
🔑 ?

Reports Filter 🔍

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

Selections **Options**

See information on overdue items for individual patrons. Include records for:

Patrons with a Status of Active ▼

Patrons with Items Due From MM/DD/YYYY ¹³ Through MM/DD/YYYY ¹³ ▼

Patrons with items 1 9999 Days Overdue

Patrons with a Policy of Any Policy ▼

Patrons from Location ▼ From 🔍 Through 🔍

Patrons in Grade From Through

Circulation Group Code

Patrons with Last Name

Patrons in Barcode Range From Through

✔ Show Additional Selections
Create Saved Report
Run

Overdue Notice

Categories

- All Reports
- ▶ Patrons
- ▶ Titles
- ▶ Copies
- ▼ Circulation
 - Information
 - Charges and Payments
 - Notices
 - Reservations
 - Statistics / Usage
 - Charges / Payments
 - Holds
 - Inventory
 - Collection Analysis
 - Study Programs
 - Interlibrary Loans
 - Special
 - Legacy

Quick **Saved**
🔑 ?

Reports Filter 🔍

- Coming Due Items Notice
- Damaged Items Notice
- In-Stock Hold Notice
- Needed for Reservation Notice
- Overdue Items and Unpaid Charges Notice
- Overdue Items Notice
- Unpaid Charges Notice

Selections **Options**

Generate notices to inform patrons of overdue items that need to be returned. Include records for:

Patrons with a Status of Active ▼

Patrons with Items Due From MM/DD/YYYY ¹³ Through MM/DD/YYYY ¹³ ▼

Patrons with items 1 9999 Days Overdue

Patrons with a Policy of Any Policy ▼

Patrons from Location ▼ From 🔍 Through 🔍

Patrons in Grade From Through

Circulation Group Code

Patrons with Last Name

Patrons in Barcode Range From Through

✔ Show Additional Selections
Create Saved Report
Run

Loaned Items Report

Categories

- All Reports
- ▶ Patrons
- ▶ Titles
- ▶ Copies
- ▼ Circulation
- Information
- Charges and Payments
- Notices
- Reservations
- Statistics / Usage
- Charges / Payments
- Holds
- Inventory
- Collection Analysis
- Study Programs
- Interlibrary Loans
- Special
- Legacy

Quick **Saved**

Reports Filter

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

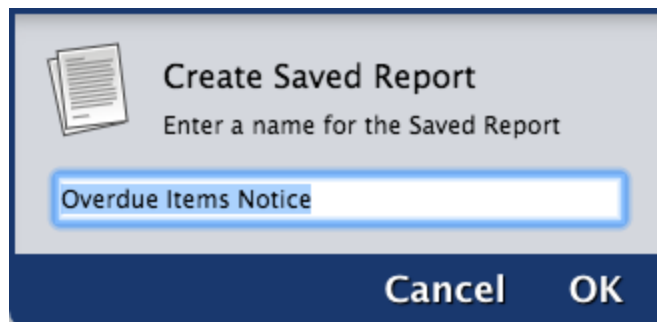
Selections **Options**

See loaned items (including temporary items) for:

- Patrons with a Status of
- Patrons with Items Borrowed From Through
- Patrons with Items Due From Through
- Patrons with a Policy of
- Copies with a Policy of
- Patrons from From Through
- Patrons in Grade From Through
- Circulation Group Code
- Patrons with Last Name

Show Additional Selections

Saving, Scheduling, and Sending Reports



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

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

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

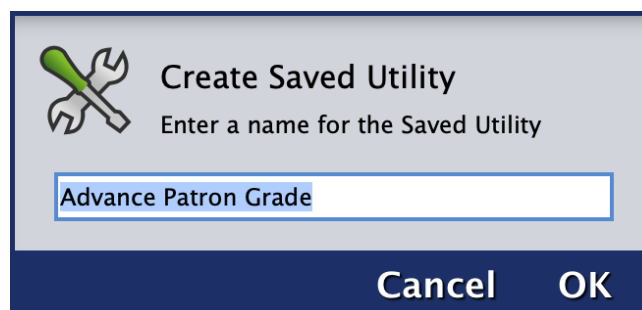
2 Utilities

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

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

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

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



Create Saved Utility
Enter a name for the Saved Utility

Cancel OK



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

Patron Utilities

Remove Patron

Categories

- All Utilities
- Patrons
- Titles
- Copies
- Circulation
- Periodicals
- Database

Quick **Saved**

Utilities

- Change Review Status
- Forgive Charges
- Remove Patron History
- Remove Patron Lexiles
- Remove Patron Notes
- Remove Patron Pictures
- Remove Patrons

Selections **Options**

Under the Options tab, choose whether or not to include patrons with checked out items or outstanding financial obligations. Remove records for:

Patrons with a Status of

Patrons in Security Group

Patrons with a Policy of

Patrons from From Through

Patrons in Grade From Through

Patrons with Cards Expiring On From Through

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

Optional Date From MM/DD/YYYY Through MM/DD/YYYY

Patrons with Last Name

Patrons in Barcode Range From Through

Patrons with Barcodes

Show Additional Selections

Title/Item Utilities

Remove Copies

Categories

- All Utilities
- Patrons
- Titles
- Copies
- Circulation
- Periodicals
- Database

Quick **Saved**

Utilities

- Change Vendor
- Check Out
- Declare Checked Out Copies Lost
- Declare Missing Copies Discarded
- Declare Missing Copies Lost
- Remove Archived Copies
- Remove Copies

Selections **Options**

Remove copy records for:

Copies with a Status of

Copies with a Policy of

Copies from From Through

Copies with a Medium of

Copies in Call Number Range From Through

Copies added From MM/DD/YYYY Through MM/DD/YYYY

Copies from Title

Copies in Barcode Range From Through

Copies with Barcodes

Show Additional Selections

3 Imports

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

Importing Patron Records

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

The screenshot displays the Alexandria software interface for importing patron records. The main window is titled 'Imports' and includes a 'Choose File' button for 'Student Import' and a 'Field Mapping' button. Below these are 'Import Settings' and 'Barcode Handling' sections. The 'Import Settings' section includes a 'Skip First Record' checkbox (checked), 'Defaults' for Site (COMP - COMPanion...), Patron Policy (Standard Patron), and Security Group (Patron (5)), and 'Patron Updates' options (Always Create New Records on Import and Allow Import to Modify Existing Records). The 'Barcode Handling' section includes a 'Starting Patron Barcode' field (1100001) and radio buttons for 'Assign new Barcodes' and 'Use Barcodes in Import File' (selected), along with a 'Strip Leading Alpha Characters' checkbox.

A 'Patron Field Mapping' dialog box is open, showing a table of fields to be imported. The dialog includes a 'Cancel' button and a 'Set' button. The table lists the following fields with green checkmarks indicating they are selected for import:

Field	Selected
First Name	✓
Last Name	✓
Barcode	✓
Homerom	✓
Grade	✓
Status	✓
SSN	✓
Middle Name	✓
2nd Location	✓
Policy	✓
Patron #	✓
Site	✓
Optional Date	✓

To import patron records:

1. Click the **Tools** module from the **Librarian sidenav** and select **Import** from the list of **Tools**.
2. Click **Patrons** from the list of **Categories** in 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. 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**.

To import patron pictures:

1. Go to the **Tools** module 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

Imports

Choose File No file chosen

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

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 1300030

- Skip First Record if Field Mapping
- 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:

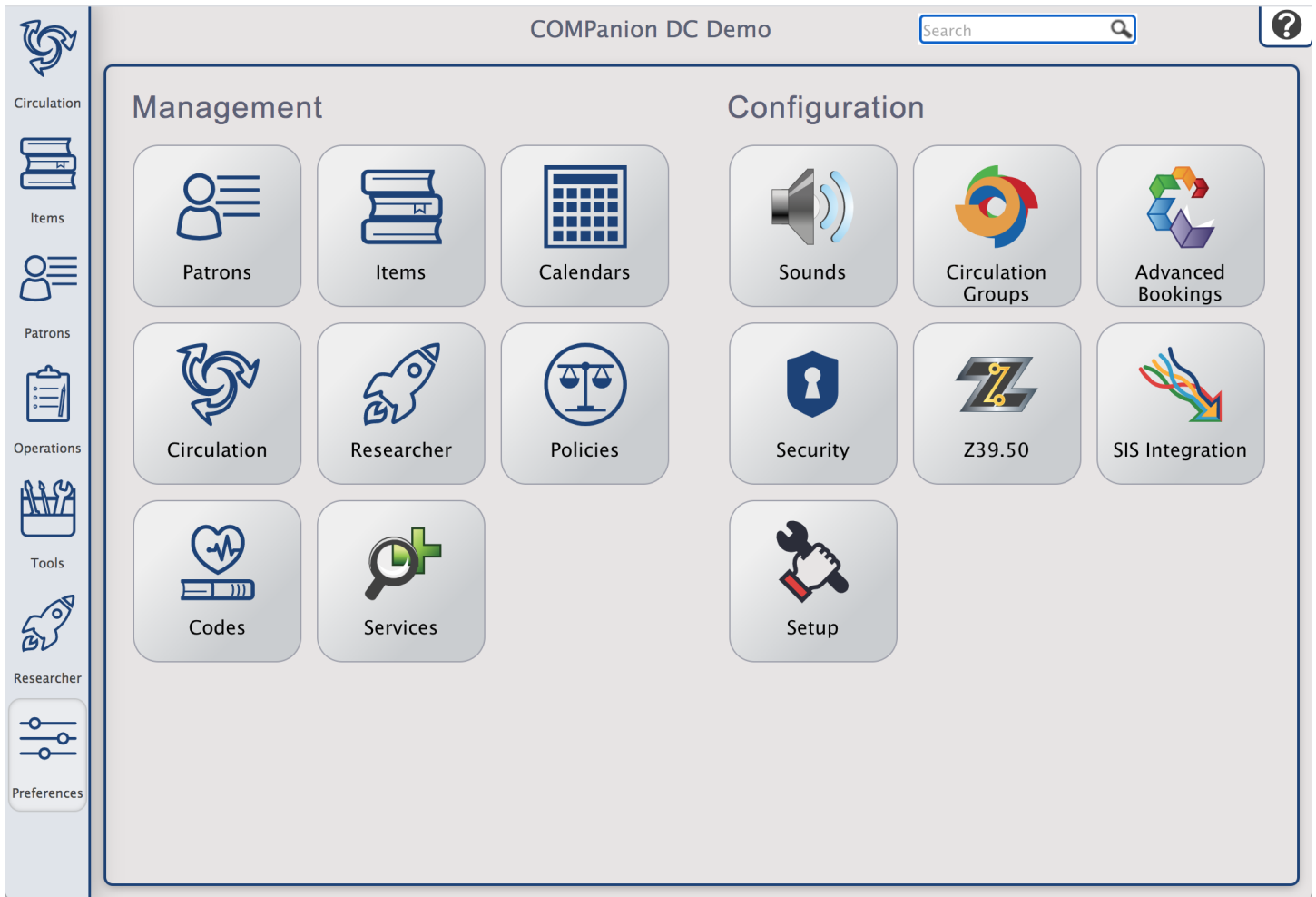
1. Go to the **Tools** module and select **Import**.
2. Click the **Items** category in the **Categories** pane.
3. Use the **Settings** tab to set your selections for the item import. When importing item records for eBooks from a vendor, select **Import Titles Only** from the **Import Settings** section.
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**).

4 Preferences

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



Management Preferences

POLICIES

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

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



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

Using the Policies Preference

The screenshot displays the 'COMpanion DC Demo' interface with a sidebar on the left containing icons for Circulation, Items, Patrons, Operations, Tools, and Preferences. The main area is divided into two panels: 'Patron Policy' and 'Item Policy'. Both panels have tabs for 'Check Out', 'Overdue', and 'Other'. The 'Patron Policy' panel is set to 'Standard Patron' and shows 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' (Standard Patron). The 'Item Policy' panel is set to 'Standard Item' and shows fields for 'Item Policy Short Code' (STD), 'Loan Fee' (\$0.00), 'Default Replacement / Purchase Cost' (\$20.00), 'Maximum Renewals for Item' (1), 'Hard Due Date' (mm/dd/yyyy), 'Statistics Group' (Standard Item), and 'Transaction Period' (14 Days). Both panels have a 'Notes' section at the bottom and a footer with 'Add Remove Duplicate Rename' buttons.

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

PATRONS

Patron Rules

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

Patron Defaults

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

The screenshot shows the 'Patron Defaults' configuration page in the COMPanion DC Demo system. The page has a navigation sidebar on the left with icons for Circulation, Items, Patrons, Operations, Tools, Researcher, and Preferences. The main content area is titled 'Patron Defaults' and contains the following sections:

- Barcode Settings:** A text input field for 'Next Barcode' is set to '1100001'. The text below explains that new patrons are assigned the next available barcode number unless manually assigned.
- Policy:** A dropdown menu for 'Default Policy' is set to 'Standard Patron'. The text below explains that this preference will revert to 'Standard Patron' if an operator-created policy is later removed.
- Security Groups:** A dropdown menu for 'Default Security Group' is set to 'Patron (5)'. The text below explains that this should ordinarily always be set to 'Patron' or 'Patron Limited'.

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 'Item Defaults' configuration page in the COMPanion DC Demo interface. The page is titled 'COMPanion DC Demo' and has a 'Show All' button and a 'SITE - A' indicator. The main content area is divided into several sections:

- Barcode Settings:** A text input field for 'Next Barcode' is set to '1300030'. Below it, a note states: 'New items are assigned the next available barcode number provided here unless you assign them a number manually. Set this field when you first configure Alexandria so that new items are assigned barcode numbers that coincide with your numbering strategy.'
- Policy & Medium:** A note says: 'Select the default item policy and medium to use for new items. If an operator-created Item policy is applied and later removed, this preference will revert back to **Standard Item**'. There are two dropdown menus: 'Default Policy' set to 'Standard Item' and 'Default Medium' set to 'book'.
- Copy Location & Status Defaults:** A note says: 'Values entered here will be used as defaults when changing copy locations using the Set All Copy Locations data manipulation command: "CH"'. There are two radio buttons for 'New Copy Default Status': 'Available' (selected) and 'In Processing'. There is a 'Site' dropdown menu set to 'COMPanion DC Demo', and two empty text input fields for 'Copy Location' and 'Copy Shelving'.
- Temporary Items:** A note says: 'Any item with a barcode in this range will be automatically assigned temporary status. These barcodes must be numeric.' There are two text input fields: 'Beginning Temporary Barcode Number' set to '90000000' and 'Ending Temporary Barcode Number' set to '99999999'. There is a 'Default Temporary Item Policy' dropdown menu set to 'Standard Item'.
- Default Z39.50 Set:** A note says: 'Select the default Z39.50 Set to use in Title Assistant when adding new items.' There is a 'Default Z39.50 Selection' dropdown menu set to 'COMPanion Default Set'.

The left sidebar contains navigation icons for Circulation, Items, Patrons, Operations, Tools, Researcher, and Preferences.

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).

Cataloging

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

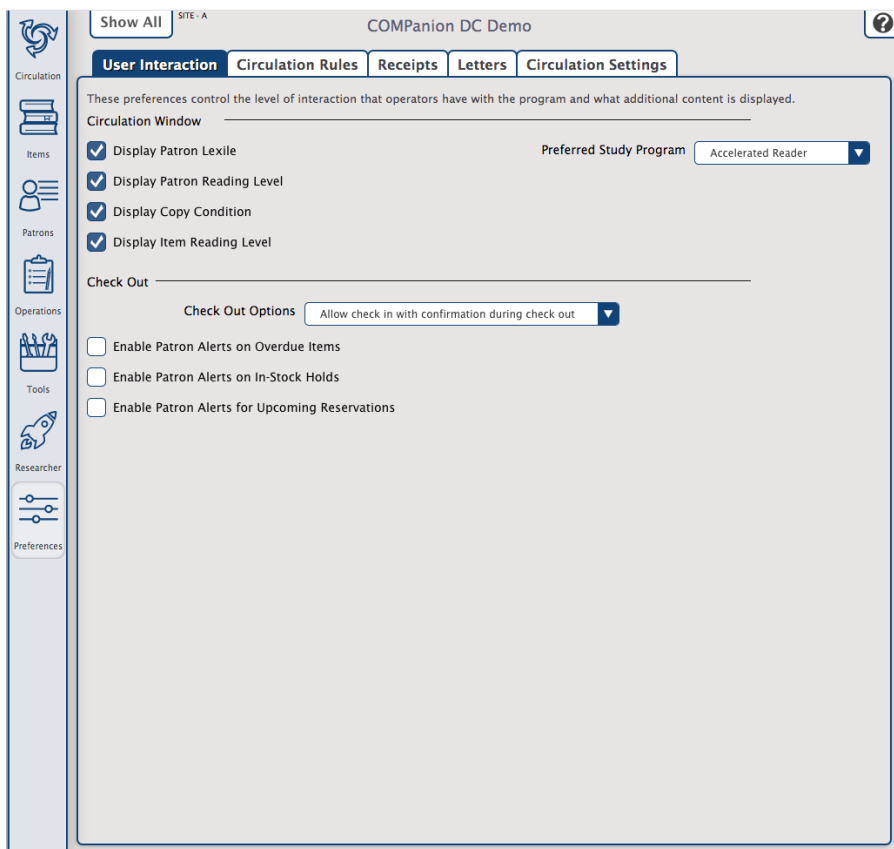
Cover Art

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.



Circulation Rules

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

Receipts

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

Letters

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

Circulation Settings

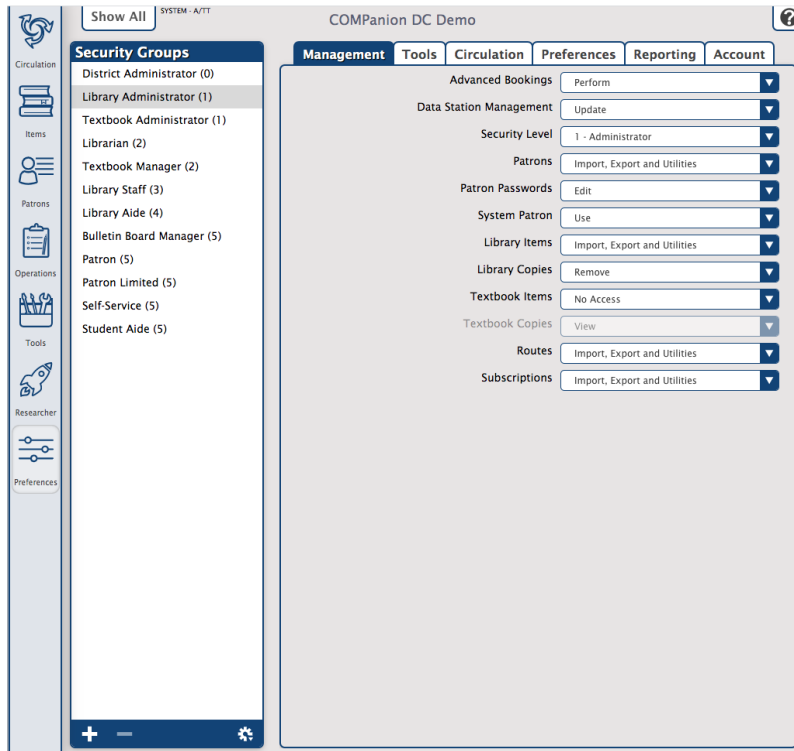
This is where you will Enable Automatic Email Notifications. For those in a Centralized Catalog environment, the Interlibrary Loans settings configure the default time periods (in days) allowed for items "in transit" or "in stock" before showing up in the In Transit to Current Site, Late in Arrival report.

Configuration Preferences

SECURITY

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

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



Management

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

Tools

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

Circulation

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

Preferences

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

Reporting

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

Account

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

Z39.50

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

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

The screenshot displays the COMPanion DC Demo interface. At the top, there is a navigation bar with a "Show All" button, the text "SYSTEM - A", and the title "COMPanion DC Demo". A help icon is visible in the top right corner. On the left side, a vertical sidebar contains icons for various system functions: Circulation, Items, Patrons, Operations, Tools, Researcher, and Preferences. The main content area is divided into two panels. The left panel, titled "Sets", shows a dropdown menu for "COMPanion Default Set" with two entries: "Unknown - DC - Special - Library of ..." and "Unknown - OH - Special - OhioLINK". The right panel, titled "Z39.50 Servers", contains a search bar and a list of two server addresses: "Unknown - DC - Special - Library of Congress, lx2.loc.gov:210 (LCDB)" and "Unknown - OH - Special - OhioLINK, olc1.ohiolink.edu:210 (INNOPAC)". At the bottom of the interface, there are control buttons: a plus/minus sign and up/down arrows on the left, and an "Add To Set" button with a gear icon on the right.

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.

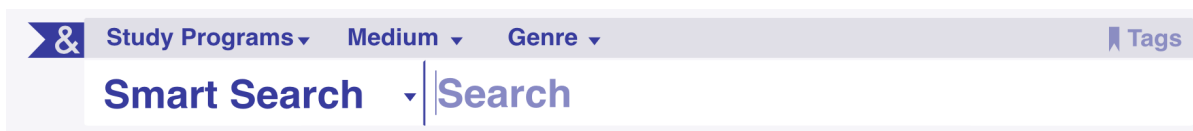
1 Search

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

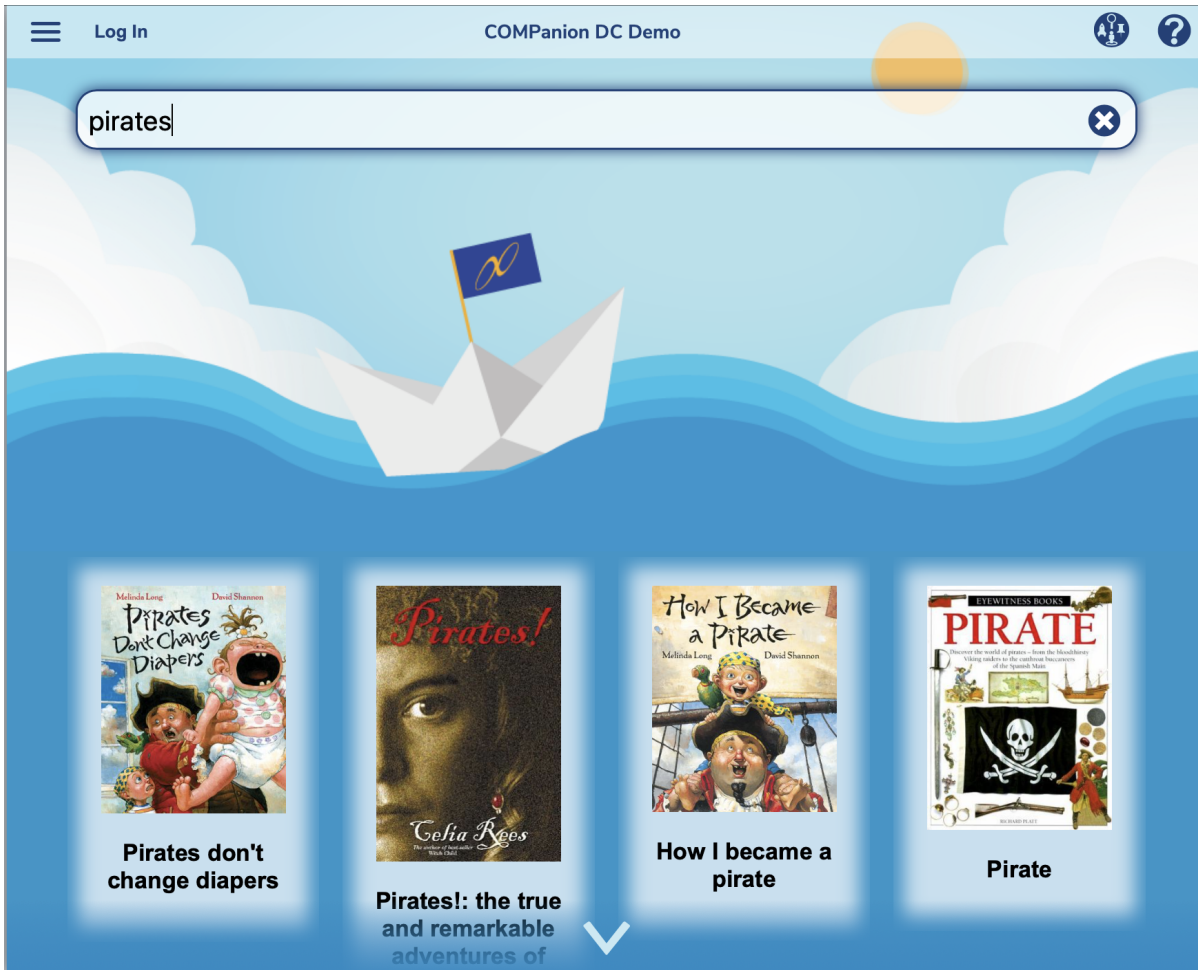
As you type, Alexandria will start returning the most relevant results immediately.

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.



3 Explore

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



EXPLORE PANES

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

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

4 Bulletins



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

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

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

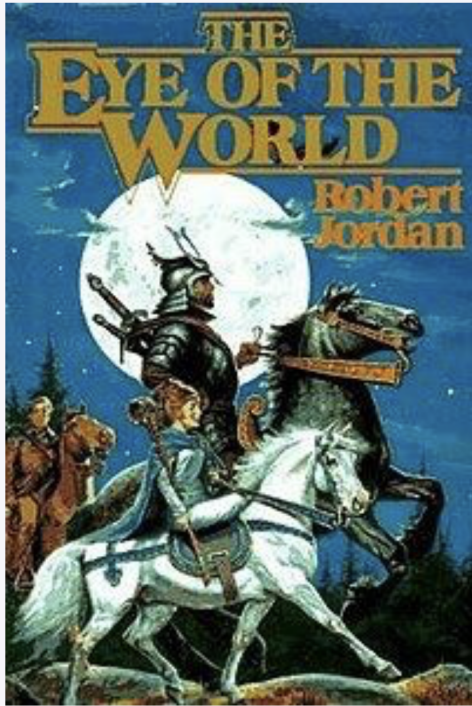
You can even attach links to Alexandria reports generated from Operations Management; instead of posting a Patron Overdue List to your library wall, you could provide a link in a special bulletin.

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

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

5 Slideshow

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



FIC JOR

★★★★★ (3)

The eye of the world

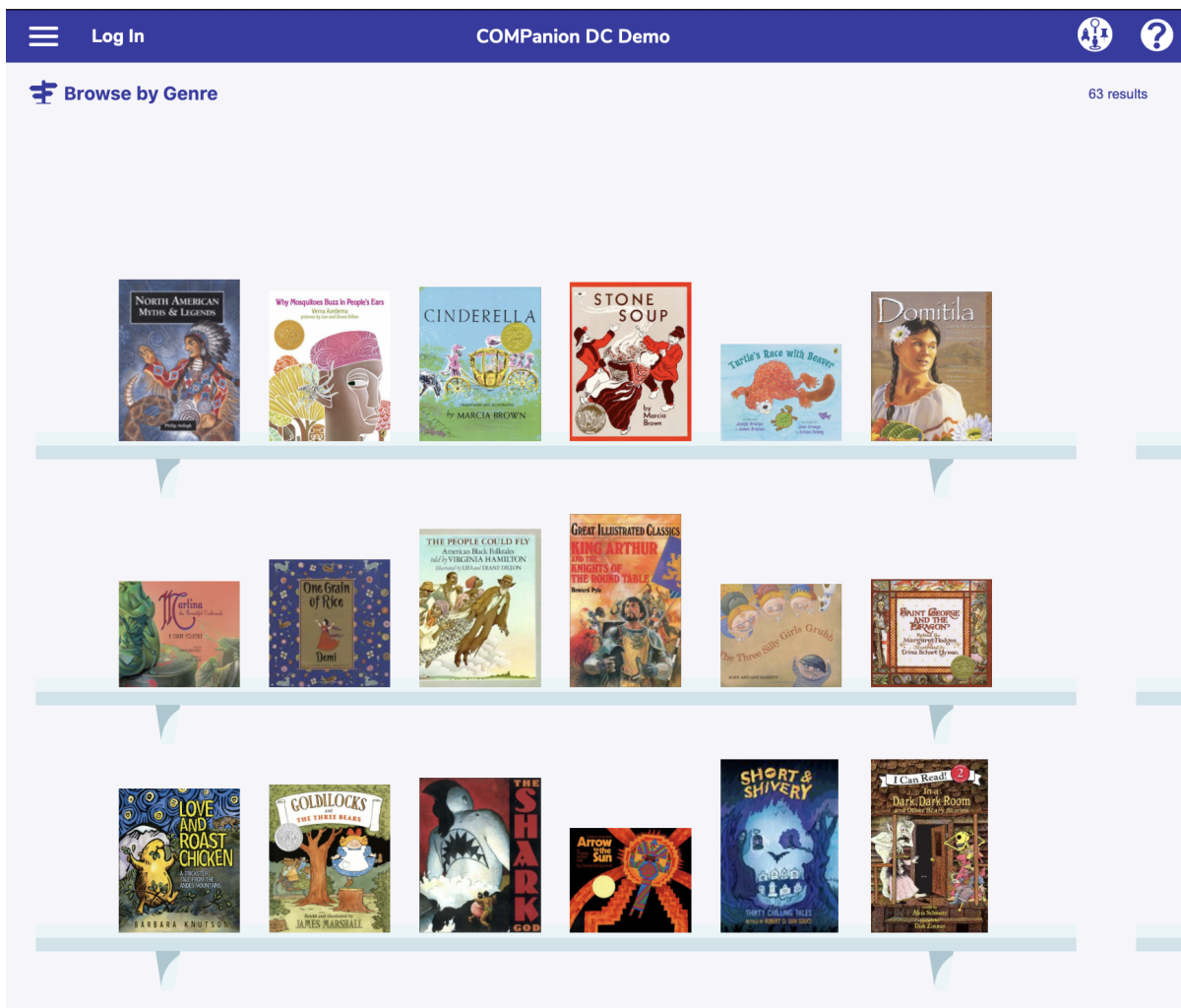
Jordan, Robert

Three villagers of Emond's Field take hold of their destiny and journey to the western lands to fight The Dark One before he destroys the entire universe.

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.



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.