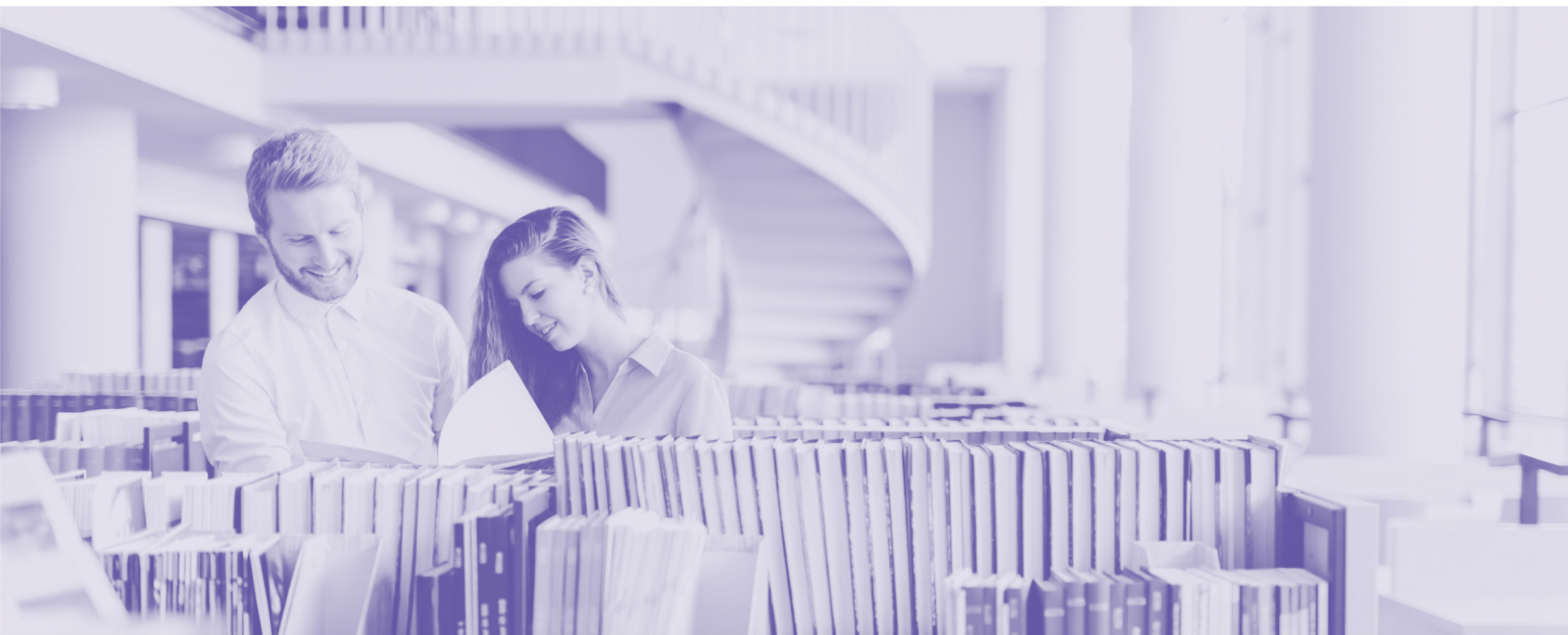


Alexandria[®]

BASIC TRAINING GUIDE

VERSION 7



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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

A. BACKUP, BACKUP, BACKUP

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. You should perform at least one backup any day your data is modified. We never discourage customers from keeping additional backups. If you are using the same drive to store all the backups, remember to rename each saved data folder to include the date (e.g. Jan012019Data, or 04292019Data).

You do not need to backup the software. COMPanion can quickly replace the software if it ever becomes corrupted as long as your site is current on its support subscription. What COMPanion **cannot** replace is your data—so BACK IT UP!

It is strongly recommended that at least one copy of your data be stored off-site (e.g. take the Friday backup home). Libraries have been burglarized and all computer equipment including the backup discs have been stolen. Libraries have also burned down and the backups have been instrumental in obtaining a quick settlement from the insurance company.

Central Catalog: Only one person needs to do the backup.

Note: 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.



HELP & SUPPORT

B. 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. It's an automatic method of saving your database before you perform large changes (e.g. importing, updates, utilities, or machine upgrades). 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.

C. 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:

- Click the **Tools** module from the **Alexandria Librarian** interface, select **Preferences**, and click on **Security** in the **Configuration** category.
- Click on the **Security Group** you wish to customize.
- 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.
- When finished, click on **Save** in the upper-right corner of the window.

To add an operator:

- Click on the **Patrons** module from **Alexandria Librarian**.
- 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 (🔍).
- Use the **Security Group** drop down menu to select the appropriate security group. Click on **Save**.



HELP & SUPPORT

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.



HELP & SUPPORT

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 email **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:

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

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

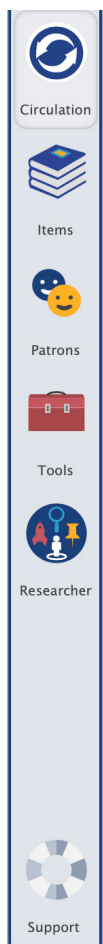


LIBRARIAN

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 NAVIGATION BAR

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





PATRONS

1 ADDING PATRONS MANUALLY

To add a new patron record:

- Click on the [Patrons](#) module from the Librarian Navigation Bar. (TRICK: You may also click on the **Current Patron's** name or on the words **No Current Patron** in the **Circulation** window).
- The **Patrons** window will appear. Click the **Add (+)** button near the bottom left corner to add a new patron to you database.
- Move between the **Personal Info**, **Contact Info**, **Notes**, **Statistics**, and **Lexile** tabs, providing information, configuration options, and making changes to the patron record as needed.
- Use the dropdown menus to supply the new patron's **Policy**, **Status**, and **Sex**.
- Use the **Notes** tab to add any special patron alert notes.
- Next, if you intend to give your new patron any operator privileges (e.g. Student Aide), use the **Site Access** selection to mark the sites that your patron is permitted to access. Otherwise, leave this selection alone.
- Click **Save** to add your new patron record or **Revert** to discard them.

The screenshot displays the 'Patrons' management interface. On the left is a navigation bar with icons for Circulation, Items, Patrons, Tools, and Researcher. The main area is titled 'Full Name' and contains a large empty text box. Below this is a 'Personal Info' tab, which is active. The form fields include: First Name (with a user icon), Middle Name, Last Name, Barcode (set to 'Auto'), Policy (dropdown: 'Standard Patron'), Sex (dropdown: 'Unknown'), Site (dropdown: 'COMP - COMPanio...'), Location, 2nd Location, Patron #, SSN, Reading Level, Grade, Birthdate (mm/dd/yyyy), Optional Date (mm/dd/yyyy), and Card Exp Date (disabled). On the right side of the form, there is a profile picture placeholder (a blue silhouette with a question mark), Status (dropdown: 'Active'), Susp. End Date (mm/dd/yyyy), Security Group (dropdown: 'Patron (5)'), Username, Password, Confirm Password, and Email. At the top right of the form are buttons for 'Revert', 'Save', and a help icon. At the bottom right is a 'Site Access' section.



PATRONS

2 MODIFYING PATRON RECORDS

Full Name	?
Anderson, Darla	
Anderson, Dustin	

Personal Info	Contact Info	Notes	Statistics	Lexile
First Name: Darla			182	
Middle Name:				
Last Name: Anderson				
Barcode: 1001				
Policy: High Student				
Sex: Female				
Site: COMP - COMPANIO				
Location: Jones				
2nd Location: Dibb				
Patron #: 1001				
SSN:				
Reading Level: 10.9				
Grade: 11				
Birthdate: mm/dd/yyyy				
Optional Date: mm/dd/yyyy				
Card Exp Date: disabled				
Status: Active				
Susp. End Date: mm/dd/yyyy				
Security Group: Patron (S)				
Username: danderson				
Password:				
Confirm Password:				
Email: danderson@dlavsp.com				

To modify a patron record:

- Click on the Patrons module from the Librarian Navigation Bar.
- Click the Find icon (🔍) at the bottom of the left pane. The Patron Lookup, shown here, will open.
- 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.
- Unlock the patron's record by clicking on the Lock icon.
- Make changes to the patron's record and click Save.

3 DELETING PATRONS

To remove a patron record:

- Click on Patrons from the Librarian Navigation Bar.
- Locate the patron's record and highlight the Patron's name in the left pane. Click on the Actions Menu (⚙️) and select Remove Patron.

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

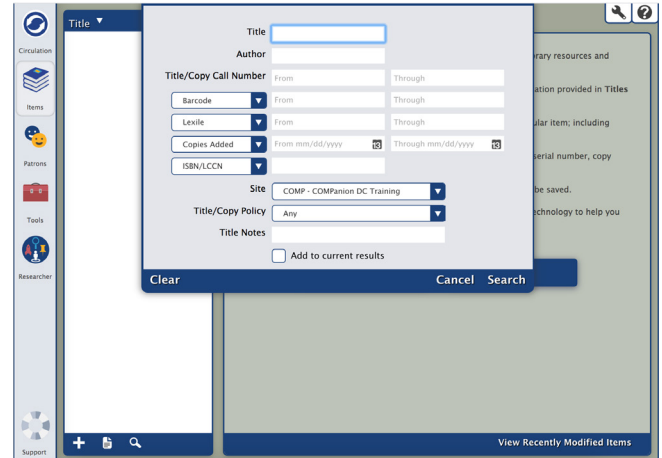


ITEMS

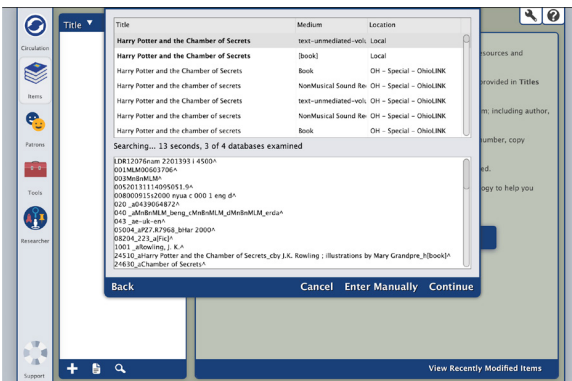
1 FINDING ITEMS

To find an item record:

- Click on the [Items](#) icon from the Librarian Navigation Bar. Item Management will open.
- Click **Search**, or click the Find icon (🔍) in the bottom left hand corner.
- Your results will be listed in the left pane.

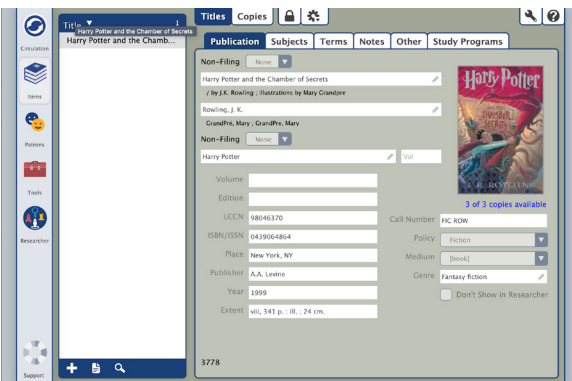


2 ADDING AND CATALOGING TITLES



To add a new title record to your database:

- Click on **Items** from the Librarian Navigation Bar.
- The **Items Management** module will appear.
- Next, click on the **Add (+)** button located near the bottom of the items pane.
- The **SmartMARC® Title Assistant** will open allowing you to add a new title record. (Press <enter> here to add a blank record.)
- Enter the **ISBN** or **Title/Author** in the **Title Assistant** window and click **Search**.
- Click and highlight to preview the **MARC** record you like best and click **Continue**.
- Modify the **Call Number**, update any necessary fields, and select the proper **Policy** for the item from the **Policy** dropdown menu.
- Click **Save** to add your new title record or **Revert** to discard it. At this time you will want to add the initial copy.




Note: 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.



ITEMS

3 ADDING NEW COPIES

To add a new copy to the title record:

- Click on the **Items** module from the **Librarian Navigation Bar**, and **Item Management** will open.
- 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.
- 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.
- Next, click the **Add (+)** button located near the bottom left of the items pane to add a new copy.
- Pay attention to all of the fields on the **Information Tab**, providing information, configuring options, and making changes to the copy record as needed.
- **Barcode** is required to save your new copy; however, if you do not provide that information, it will default from your [Next Barcode](#) settings.
- Click **Save**.

The screenshot displays the 'Copies' tab for a title record titled 'Harry Potter and the Half-Blood Prince'. The interface includes a sidebar with navigation options: Circulation, Items, Patrons, Tools, and Researcher. The main content area shows a list of barcode numbers (31881, 21809, 12074) and a detailed 'Information' form for adding a new copy. The form fields include:

- Barcode: 31881
- Copy ID: 1
- Volume: (empty)
- Call #: FIC ROW
- Serial #: (empty)
- Policy: Fiction
- Condition: Unknown
- Vendor: (empty)
- Copy Notes: (empty)
- Alert Notes: (empty)
- Site: COMP - COMPanio...
- Copy Location: (empty)
- Copy Shelving: (empty)
- Purchase Cost: \$20.00
- Replacement Cost: \$20.00
- Funding Source: (empty)
- Inventory Date: Nov 7, 2014
- Security Device: None
- Desensitize:


Additional information shown includes Accession Date: 11/07/2014 and Status: Available. The number 2904 is visible at the bottom of the form.

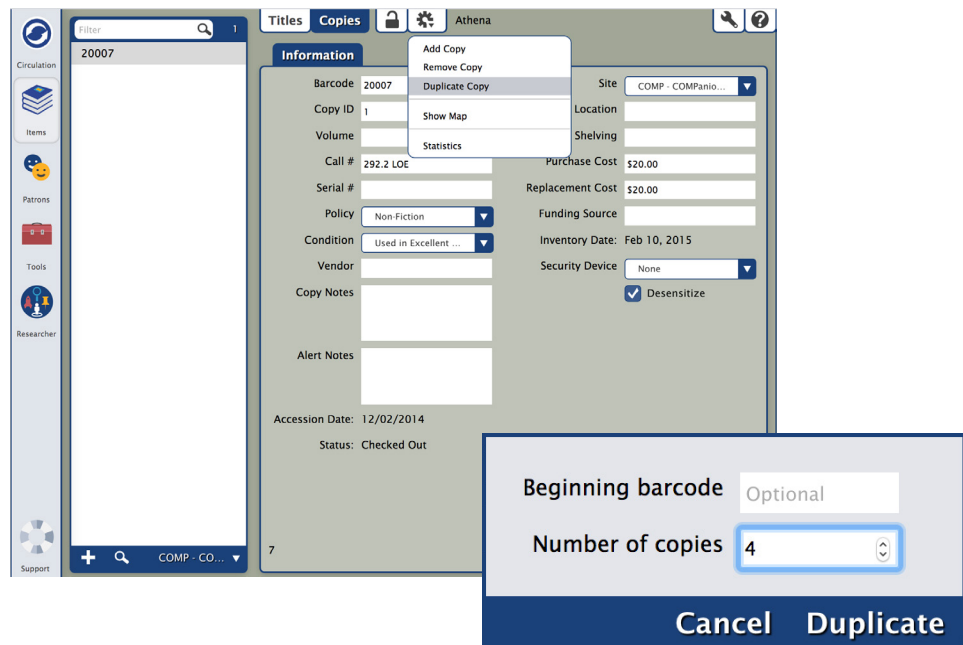


ITEMS

4 DUPLICATING TITLES OR COPIES

To duplicate copies:

- Click on Items from the Librarian Navigation Bar. Item Management will appear.
- Open the Item Record and click on the Copies tab.
- Click on the Actions icon  next to the lock icon and select Duplicate Copy. The Duplicate Copy window will appear.
- Fill in the Beginning Barcode field and enter the number of additional copies you wish to add in the Number of Copies field.
- 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.

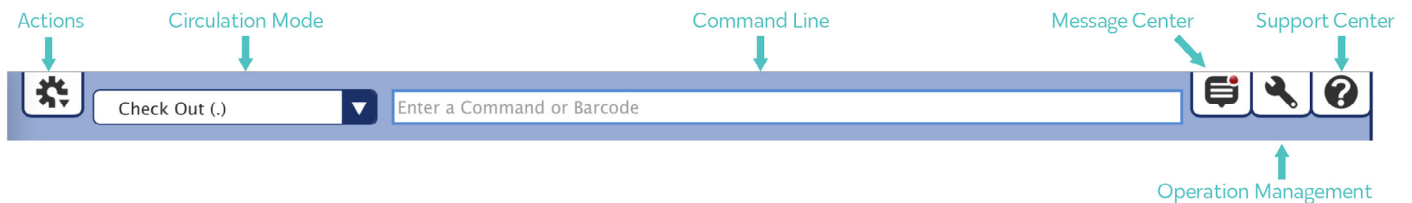
To indicate an eBook for Search purposes, the eBook Policy preference must be set to Show as ONLINE in Researcher.



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



A. 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.

B. 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:

- 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>**.
- Begin typing the patron's name and hit **<enter>**.
- Click on the correct name and then click **Select**, or double-click on the correct name.

To look up an item by title:

- 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>**.
- Type the first part of the title and press **<enter>**.
- Click on the correct title to highlight it and then click on **Select**, or double-click on the correct title.



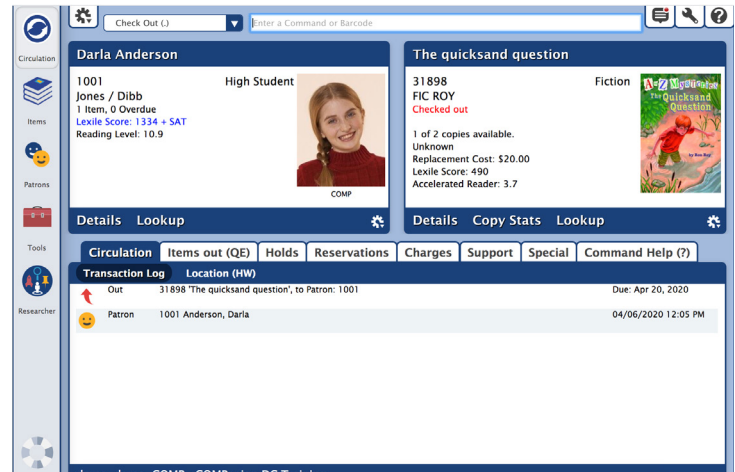
CIRCULATION

3 CIRCULATION MODES

A. CHECKOUT

To check out an item:

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



B. 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.)

C. PLACE A HOLD ON A TITLE (H)

To place a hold:

- Make the patron requesting the hold the "Current Patron."
- Use the Item Lookup window to make the item being held the "Current Item."
- 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.



CIRCULATION

D. DECLARING A COPY LOST OR RENEWING AN ITEM

To declare an item lost:

- Make the patron with the lost item(s) current by scanning or typing their patron barcode. If the barcode was typed, press <enter>.
- Click on the **Items Out** tab.
- Highlight the desired item(s).
- Click on **Declare Lost OR Renew**.
- If you are sure you want to make the selected item(s) lost, click **Yes** on the dialog window that opens.
- Complete the process in the **Lost Item Fee** window (or the **Overdue Fine** window, if renewing overdue items) 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:

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

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"/>

E. DISCARDING ITEM COPIES

To discard a single damaged item:

- 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.
- Scan or type the barcode for the damaged item to be discarded. The **Discarded Copies** patron will become the **Current Patron**.
- In the **Discarded Fee** window, you may forgive the charge, enter a payment amount, and process it with or without a receipt.



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.

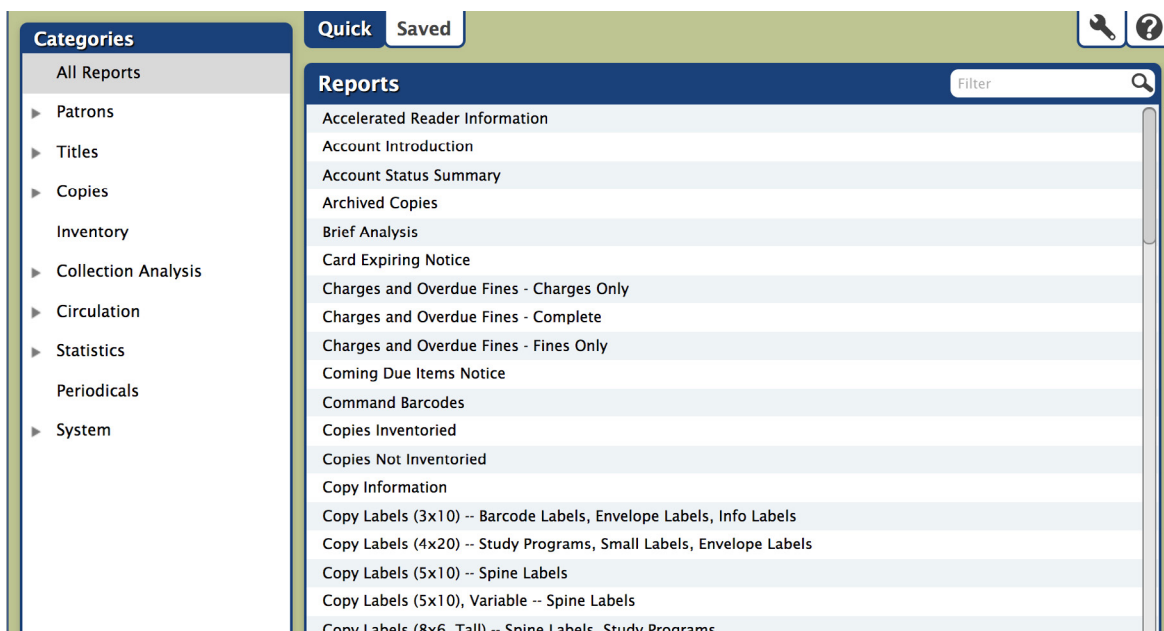
I REPORTS

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** interfaces 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**.





TOOLS

To create a new report:

- Select **Tools**, then select **Reports**.
- The **Filter** bar, in conjunction with the **Categories** pane, can be used to further filter the list of results in the **Report Selection** pane.
- 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 category name.
- 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.
- 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.
- 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.

Note: 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.



TOOLS

A. LABEL REPORTS

Copy

Categories

- All Reports
- Patrons
- Titles
- Copies**
- Information
- Labels
- Special Status
- Usage
- Legacy
- Inventory
- Collection Analysis
- Circulation
- Statistics
- Periodicals
- System

Quick **Saved**

Reports Filter

- Copy Labels (3x10) -- Barcode Labels, Envelope Labels, Info Labels
- Copy Labels (4x20) -- Study Programs, Small Labels, Envelope Labels
- Copy Labels (5x10) -- Spine Labels
- Copy Labels (5x10), Variable -- Spine Labels
- Copy Labels (8x6, Tall) -- Spine Labels, Study Programs
- Copy Labels (8x6, Tall), Variable -- Spine Labels, Study Programs
- Copy Labels (8x6, Wide) -- Spine Labels

Selections **Options**

This report is formatted for 3 x 10 label sheets, COMPanion Part Number V0055. Include 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

Patron

Categories

- All Reports
- Patrons**
- Information
- Account
- Labels
- Forms
- Reviews
- Usage
- Lexile
- SIF
- Email
- Titles
- Copies
- Inventory
- Collection Analysis
- Circulation
- Statistics
- Periodicals
- System

Quick **Saved**

Reports Filter

- Patron Barcode Labels (3x10)
- Patron Labels (4x20)
- Patron Mailing Labels (3x10)

Selections **Options**

This report is formatted for 3 x 10 label sheets, COMPanion Part Number V0055. Include labels 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 added From MM/DD/YYYY Through MM/DD/YYYY

Patrons with Last Name

Patrons in Barcode Range From Through

Patrons with Barcodes

Show Additional Selections



TOOLS

B. OVERDUE ITEMS

The screenshot shows the 'Overdue Items' report configuration page. On the left is a 'Categories' sidebar with a tree view including: All Reports, Patrons, Titles, Copies, Inventory, Collection Analysis, Circulation, Information, Charges and Payments, Notices, Holds, Reservations, Statistics, Periodicals, and System. The 'Circulation' category is expanded to show 'Information'. The main area has tabs for 'Quick' and 'Saved'. Below is a 'Reports' list with a search filter, containing: Loaned Items Information, Overdue Items and Unpaid Charges Information, Overdue Items Information, Overdue Items Posting List, and Temporary Items Information. The 'Overdue Items Information' report is selected. Below the reports is a 'Selections Options' section with the heading 'Include records for:'. It contains several filter fields: 'Patrons with a Status of' (Active), 'Patrons with Items Due' (From MM/DD/YYYY, Through MM/DD/YYYY), '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', and 'Patrons in Barcode Range' (From, Through). At the bottom, there are buttons for 'Show Additional Selections', 'Create Saved Report', and 'Run'.

C. OVERDUE NOTICE

The screenshot shows the 'Overdue Notice' report configuration page. The 'Categories' sidebar is identical to the previous screenshot, with 'Circulation' expanded to 'Notices'. The main area has 'Quick' and 'Saved' tabs. The 'Reports' list includes: Coming Due Items Notice, Damaged Items Notice, In-Stock Hold Notice, Lost Items Charge Notice, Needed for Reservation Notice, Overdue Items and Unpaid Charges Notice, and Overdue Items Notice. The 'Overdue Items Notice' report is selected. The 'Selections Options' section is identical to the previous screenshot, with the heading 'Include records for:'. At the bottom, there are buttons for 'Show Additional Selections', 'Create Saved Report', and 'Run'.



TOOLS

D. LOANED ITEMS REPORT

Categories

- All Reports
 - Patrons
 - Titles
 - Copies
 - Inventory
 - Collection Analysis
 - Circulation
 - Information
 - Charges and Payments
 - Notices
 - Holds
 - Reservations
 - Statistics
 - Periodicals
 - System

Quick Saved

Reports

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

Selections Options

This report will include loaned items and 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

Patrons in Process by Report

Show Additional Selections



TOOLS

E. 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.

Create Saved Report
Enter a name for the Saved Report
Overdue Items Notice
Cancel OK

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

- Click Reports from the Tools module and choose Circulation from the Categories pane.
- Choose Notices from the expanded dropdown list and then Overdue Items Notice from the Report Selection pane.
- Click on the Selections tab and enter the selection criteria for the report including Patron Status, Days Overdue, Patron Homeroom, Patron Grade, and more.
- Click Create Saved Report, name your saved reports, and click OK.
- 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.
- Click Schedule, unlock the report and then click the Schedule Report checkbox.
- 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.
- Click the Notifications tab and check the box to Enable Email Notification. Enter the email address of, for example, the homeroom teacher.
- Click Save in the upper right hand corner.



TOOLS

2 UTILITIES

[Utilities](#) can be accessed by selecting the **Tools** module from the **Librarian Navigation Bar** 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

Advance Patron Grade

Cancel OK

Note: A complete list of Utilities can be found [HERE](#).

A. PATRON UTILITIES

Remove Patron

B. TITLE/ITEM UTILITIES

Remove Copies



TOOLS

3 IMPORTS

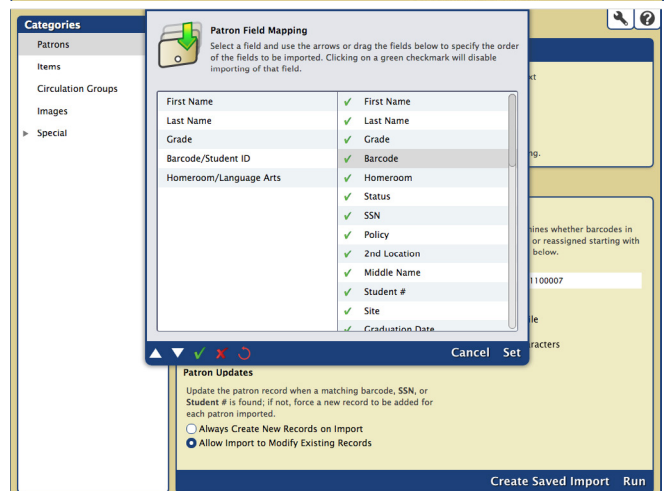
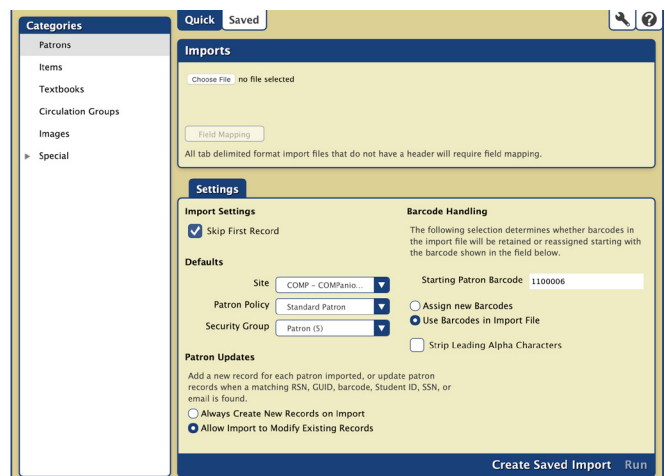
There are times when you'll want to add information into Alexandria from outside sources (such as MARC records, book vendors, or patron information from a central database), called an [Import](#). Our software supports the importation of patron, item, and transaction command information.

A. 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.

To Import Patron Records:

- Click the Tools module from the Librarian Navigation Bar and select **Import** from the list of Tools.
- Click **Patrons** from the list of **Categories** in the **Categories** pane.
- Select **Allow Import to Modify Existing Records** in order to import current information into existing patron records.
- 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.
- Browse and select the file to be added.
- 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**.
- Click on **Run** to queue the patron import.





TOOLS

Note: 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**.

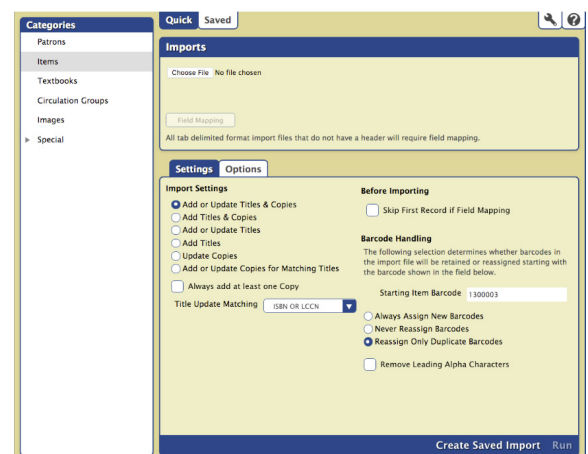
To Import Patron Pictures:

- Go to the **Tools** module and select **Import**.
- Click on **Images** from the **Categories** pane.
- Select **Patron Pictures** from the options on the **Settings** tab.
- Browse and select the folder containing the picture files.
- Click **Run**. The import will be queued in **Operation Management**.

B. IMPORTING ITEMS

To Import Item Records from a Vendor File:

- Go to the **Tools** module and select **Import**.
- Click the **Items** category in the **Categories** pane.
- 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.
- Use the **Choose File** button to find and select the file to be added.
- Click on **Run** to queue the item import.



Note: If you would like to run an **Archive** before making mass changes to the database, for example, when running **Utilities** or **Imports**, please see *Database Utilities* or *Administration* in **Tools**.



TOOLS

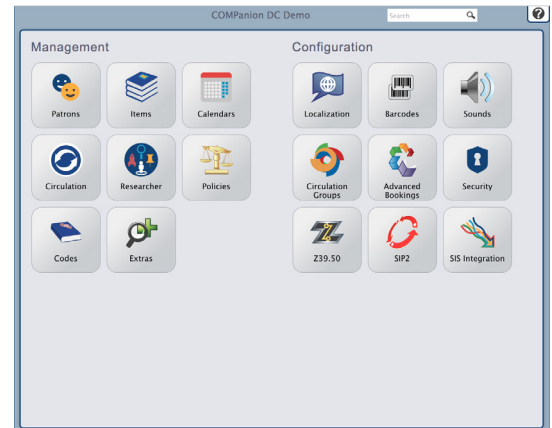
4 PREFERENCES

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.

A. 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](#).

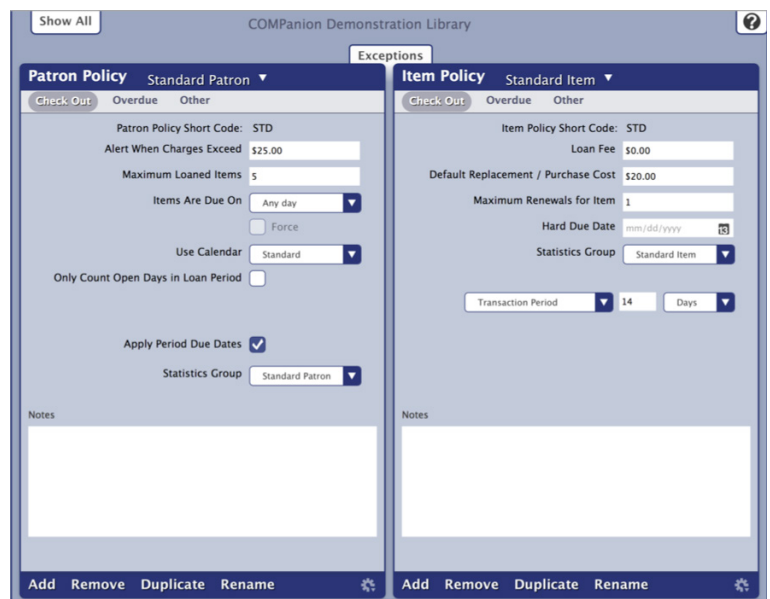


For example, you can set policies that allow tenth graders to check items out for longer periods of time than second graders; the borrowing period for reference items can be set for one day, while fiction and nonfiction works can be set for two weeks, etc.

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

Using the Policies Preference

When you first enter Alexandria, Standard Patron and System Patron are set as default patron policies while Standard Item, System Item, eBook 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.





TOOLS

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.

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 **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.

Lexile

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



TOOLS

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.

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 number 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

Drag and drop an image of nearly any format (e.g. .jpg, .gif, .png, or .bmp) supported by your browser into the Medium Picture field. After completing this action, a new default image is applied to every item (of that medium) lacking individual cover art. Item pictures are used in several areas of the program, including the Circulation window every time an item is made current.

COMPanion Demonstration Library

Item Defaults | Policy Mapping | Cataloging | Cover Art

These preferences configure some of the default settings applied to new items when they are added to your collection.

Barcode Settings

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.

Next Barcode: 1300001

Policy & Medium

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

Default Policy: Standard Item | Default Medium: book

Copy Location & Status Defaults

Values entered here will be used as defaults when changing copy locations using the Set All Copy Locations data manipulation command: "CH".

New Copy Default Status: Available | In Processing | Site: COMPanion Demonstration Library

Copy Location: | Copy Shelving: |

Temporary Items

Any item with a barcode in this range will be automatically assigned temporary status. These barcodes must be numeric.

Beginning Temporary Barcode Number: 90000000 | Ending Temporary Barcode Number: 99999999 | Default Temporary Item Policy: Standard Item

Default Z39.50 Set

Select the default Z39.50 Set to use in Title Assistant when adding new items.

Default Z39.50 Selection: COMPanion Default Set



TOOLS

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 configure when receipts are printed can be located in the **Brower 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.

The screenshot shows the 'COMPanion Demonstration Library' settings window. At the top, there are tabs for 'User Interaction', 'Circulation Rules', 'Receipts', 'Letters', and 'Circulation Settings'. The 'Circulation Settings' tab is active. Below the tabs, there is a heading 'Circulation Window' and a description: 'These preferences control the level of interaction that operators have with the program and what additional content is displayed.' Under 'Circulation Window', there are four checked checkboxes: 'Display Patron Lexile', 'Display Patron Reading Level', 'Display Copy Condition', and 'Display Item Reading Level'. To the right of these is a 'Preferred Study Program' dropdown menu set to 'Accelerated Reader'. Below this is a 'Check Out' section with a 'Check Out Options' dropdown menu set to 'Allow check in with confirmation during check out'. At the bottom, there are three unchecked checkboxes: 'Enable Patron Alerts on Overdue Items', 'Enable Patron Alerts on In-Stock Holds', and 'Enable Patron Alerts for Upcoming Reservations'.



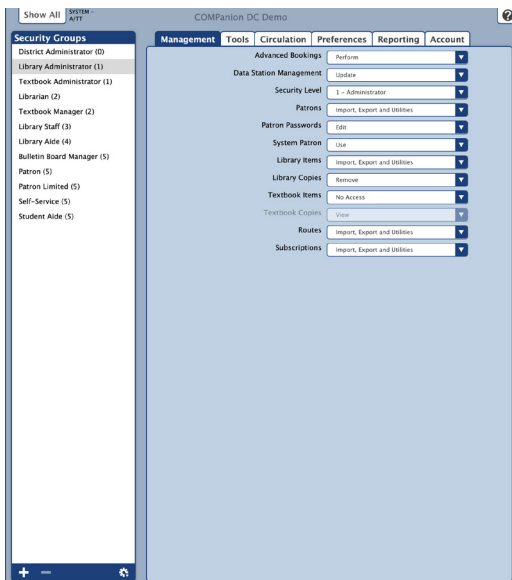
TOOLS

B. 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.



TOOLS

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.

COMPanion Demonstration Library

Sets

- ▼ COMPanion Default Set
 - Unknown - DC - Special - Library of...
 - Unknown - OH - Special - OhioLINK
 - Unknown - UT - Public - Salt Lake ...

Z39.50 Servers

- Unknown - AL - Academic - Spring Hill College--Mobile, sphc.sirsi.net:2200 (SIRSI)
- Unknown - AL - Academic - University of Alabama, Birmingham, scotty.mhsl.uab.edu:709...
- Unknown - AL - Academic - University of Alabama, Huntsvil, libsirsi.uah.edu:2200 (SIRSI)
- Unknown - AR - Academic - Arkansas Technical University, webvoyage.atu.edu:7090 (V...
- Unknown - AR - Academic - University of Arkansas, Fayette, library.uark.edu:210 (INN...
- Unknown - AR - Academic - University of Arkansas, Little, iii-server.ualr.edu:210 (INN...
- Unknown - AZ - Academic - Arizona Health Sciences Library, aloe.ahsl.arizona.edu:220...
- Unknown - AZ - Academic - University of Arizona, sabio.library.arizona.edu:210 (INNO...
- Unknown - AZ - Special - Arizona Historical Society -- Tu, lista.azhist.arizona.edu:709...
- Unknown - CA - Academic - California Institute of Technol, clas.caltech.edu:210 (INNO...
- Unknown - CA - Academic - California Institute of the Art, voyager.calarts.edu:7090 (V...
- Unknown - CA - Academic - California State University, Ba, voyager.lib.csubak.edu:709...
- Unknown - CA - Academic - California State University, Fr, 129.8.164.150:210 (MAIN*B...
- Unknown - CA - Academic - California State University, Fu, opac.fullerton.edu:210 (INN...
- Unknown - CA - Academic - California State University, Ha, libcat.csueastbay.edu:210 (...)
- Unknown - CA - Academic - California State University, Hu, voyager.humboldt.edu:709...
- Unknown - CA - Academic - California State University, Lo, coast.library.csulb.edu:210 ...
- Unknown - CA - Academic - California State University, Lo001, opac.calstatela.edu:210...
- Unknown - CA - Academic - California State University, Mo, voyager.csumb.edu:7090 (...)
- Unknown - CA - Academic - California State University, No, suncat.csun.edu:210 (INNO...
- Unknown - CA - Academic - California State University, Po, opac.library.csupomona.ed...
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+ - ▲ ▼ ◀ Add To Set ⚙



RESEARCHER

The 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.

The **Researcher** can be accessed from the Librarian by selecting **Researcher** from the main Librarian Navigation Bar. 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.



RESEARCHER

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

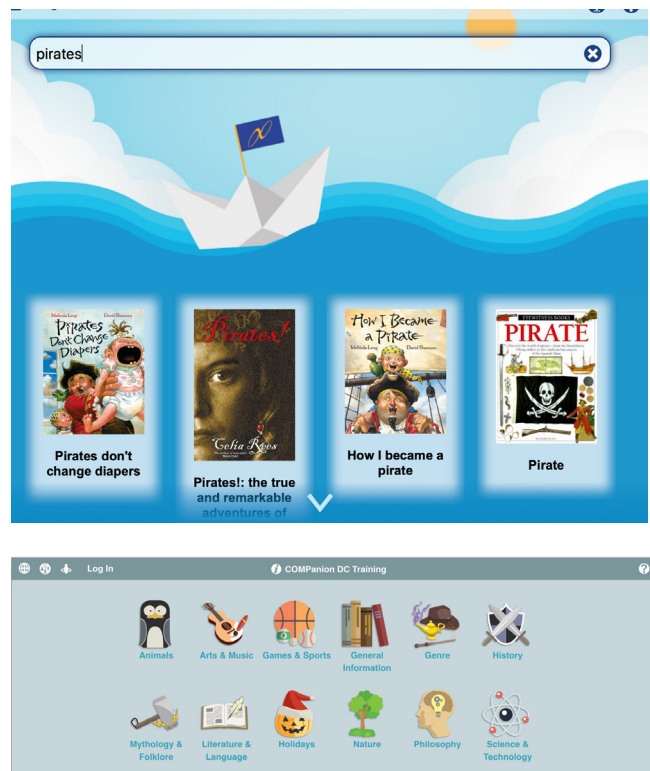
EXPLORE

[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.





RESEARCHER

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.



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.

(800) 347-4942 support@goalexandria.com

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