# Alexandria®

# Textbook Tracker

## GETTING STARTED GUIDE FOR LIBRARIANS

## TRADEMARKS & USAGE LICENSES

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# WELCOME TO ALEXANDRIA

Alexandria has been automating public, private, school, and church libraries around the world for nearly 30 years. Welcome to our family of happy users!

Alexandria is a comprehensive library automation software system designed to efficiently manage your assets, textbooks, electronic resources, and patron information—freeing librarians and technology specialists to deal with more important tasks.

The **Alexandria Librarian** interface is where you check items in and out, run reports, perform utilities, access administrative tools, and change your preferences and policies.

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

If you are self-hosted, see our *Self-Hosted Guide for Admins* to learn about **Administration** settings. Please note that these are advanced, high-level settings used to configure the data station (i.e. server). That guide is intended for network administrators, information technology support departments, or operators who have been assigned the task of overseeing your system.

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

See the Getting Started Guide for Librarians for Alexandria Librarian.

## COMPANION SOFTWARE SUBSCRIPTION INCLUDES:

- Upgrades to more advanced, future versions at no extra charge
- Customer support—24 hours a day, 7 days a week (Calls are 24/7; emails are answered in 1-2 business days.)
- Online resources, including our Support Center, training videos, and webinars.

# ① Registration

## Cloud Hosted

Registration is automatic. Just follow the URL we provide, log in or create an account, and begin managing your library immediately. COMPanion will email you the URL required to access Alexandria.

## Self Hosted

Registration is largely automatic. See our *Self-Hosted Guide for Admins* for more information. Your data station just needs to connect to COMPanion servers in order to validate.

## Logging In

If you're brand new to Alexandria, you'll be prompted to create a District Administrator account the first time you access the program. However, if you're coming from a previous version of Alexandria, you can log in with your old account.

> If you've licensed **Lexiles**, **SIP2**, **Z39.50 Server**, **Advanced Bookings**, or any of our vendors or search extras, most will be automatically activated, but you'll need to turn some on/ configure settings in your preferences.

# ② Accessing Alexandria Textbook Tracker

Alexandria interfaces are cross-platform and accessible on both Macintosh and Windows operating systems via HTML5-compliant web browsers such as Chrome, Firefox, Safari, and Edge. They're also accessible on mobile devices, laptops, and tablets, such as Apple's iPad, Google's Chromebook, and others.

See our most current list of **Alexandria Requirements** in the Support Center.

## Alexandria Interfaces

You can access various Alexandria interfaces by appending a slash and the interface's name to the end of your data station's (DNS or IP) address (e.g. http://yourlibrary.goalexandria.com**/interface,** referred to throughout this guide as your Alexandria URL). Access **Librarian**, Alexandria's primary management interface, by appending **/tt-librarian** or **/tt-circulation** to the end of your Alexandria URL.

Learn about Alexandria's basic interfaces in the **Orientation and Set Up** section of this guide and explore more by checking out our **Support Center**.

Operators attempting to access certain interfaces must have the proper Security Group permissions. You may also need to change the default ports or configure the server domain names that Alexandria uses. Read more about configuring your general web access settings in our *Self-Hosted Guide for Admins*.

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

## Additional Information for Self Hosting

If you're running a Distributed Catalog under an Alexandria Controller, you may need to follow your port number with a valid data station serial number to access a single site: http://123.456.78.910:80/1234567/librarian.
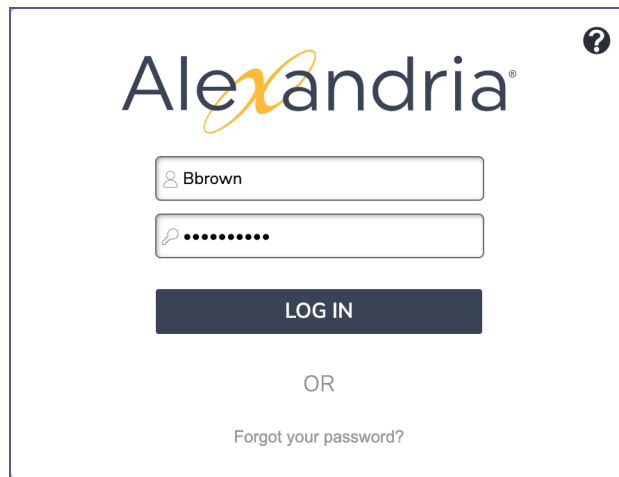
Access to individual sites can be enabled by using the Show Available Data Stations List or by setting up Server Domain Names for each data station using the **IT Controller's Administration settings**. To access the Controller's "/admin" interface, forego the site-specific serial number: http://123.456.78.910:80/admin

## Bookmarking Interfaces

For convenience, you can bookmark any interface or add it to your browser's list of favorites. You can also create a shortcut to any interface from your operating system's desktop. To do this, open the interface, highlight the URL in the address field (or "favicon") and drag it to your desktop to create a link.

## ③ Logging In



In order to prevent unauthorized access and protect your private information, a valid username and password are required to access **Textbook Tracker**.

After logging in, the name and site of the current operator is shown at the top right of the **Circulation** window.
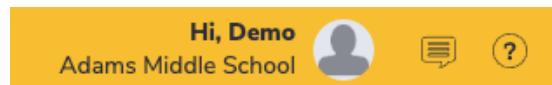


Future access to Alexandria requires each operator to have an account and belong to the appropriate Security Group. Keep in mind that you will want different operators to have permission to access certain interfaces or perform a range of tasks.

In a multi-site Centralized Catalog, you will need to select a site after logging in. If you don't yet have sites other than the **Union Site**, review the Sites Management section on page 7 and 8 to find out how and where to create them.

> You can enable and enforce SSL encryption for all connected web clients in your **Administration Settings**.

# ORIENTATION AND SET UP

## The Alexandria Textbook Tracker Interface

After logging in, you'll arrive at the **Textbook Management** window. One of the first things you'll notice is the navigation sidebar (sidenav) on the left-hand side of the window. Each icon in the sidenav is a shortcut to one area of Alexandria's **Textbook Tracker: Circulation**, **Textbook Management**, **Patrons Management**, **Operations Management**, **Tools**, or **Preferences**.

### Textbook Areas

**CIRCULATION**

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

**TEXTBOOK MANAGEMENT**

Textbook Management is where you manage information about every asset in your collection. This is also where you examine, add, modify, or remove all title and/or copy records.

**PATRONS MANAGEMENT**

Patrons Management is where you create, view, modify, and remove information about the patrons and operators who have access to your site—including their security permissions. Note that patrons are shared between **Librarian** and **Textbook** interfaces.

**OPERATIONS MANAGEMENT**

Operations Management contains Reports, Utilities, Export, and Import, and lets you view, email, or download information on recently run operations. Note that operations are shared between **Librarian** and **Textbook** interfaces.

**TOOLS**

**Tools** contains convenient shortcuts to a wide range of program and management tools. This includes everything from Sites to security settings.

**PREFERENCES**

Preferences contains various global settings that you can customize to make Textbook Tracker fit your needs (receipts, terminology, circulation alerts, and more).

As a shortcut to one of the above interfaces, follow the end of your data station's domain name with one of the following terms: "/tt-circulation", "/tt-items", "/tt-patrons", "/tt-operations",  "/tt-tools" or "/tt-preferences".

# ① Setting Up Textbook Tracker

As you explore Textbook Tracker, you will grow more comfortable with the standardized layout of the management windows and the location of important settings and features. You may notice a round Help icon ❓ in the upper-right corner of most interface windows. Clicking this will take you to a related section of the online **Support Center**.

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

Don't forget to provide a valid email in **Sites Management**. This is crucial in order for email to work in Alexandria.

# ② Sites Management – Centralized Catalog

If you are a Centralized Catalog, the sites you are licensed for show up automatically; there is no need to add or remove sites manually. Please contact our Sales Team if you would like to add additional sites. In a Centralized Catalog, you manage multiple collections, and we provide you with a Union Site. The Union Site should not be regarded as an actual, physical location. Instead, think of it as the "parent" to which all your other site collections belong.

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

This is where you'll add an email address used to send notices from Alexandria Textbook Tracker.
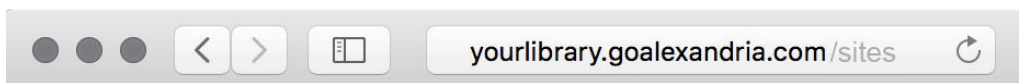


Search the **Support Center** to learn how to edit site records using **Sites Management**.

# ③ Preferences

Textbook Tracker's **Preferences** is where you'll customize it to fit your particular needs.

The checklist below is meant to serve as a quick reference to get you started. Visit our **Alexandria Support Center** or **Textbook Tracker Support Center** to get more comprehensive information on each preference. You can also **schedule a training** to learn more about preferences and get help setting them up.

To access Alexandria's **Preferences**, select **Preferences** from the side navigation. Alternatively, append "/tt-preferences" to the end of your Alexandria URL.

## Configure Tools and Preferences

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

### Tools

### SECURITY

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

### CALENDARS

**Calendars Preferences** are used to schedule library open days, closed days, period due dates, and more. Combined with **Policies**, **Calendars** are used to accurately perform circulation-based calculations: assigning due dates, calculating fines, among other things.

### POLICIES

Your **Policies** establish how library materials are used by patrons. This includes how they circulate, how long they may be checked out, how much overdue fines cost, whether an item can leave the building, how circulation periods are computed, and so forth. Policies are an essential part of successful circulation, reports, and statistics.

### Preferences

### SETUP

**Setup Preferences** allow you to configure your email, customize local terminology, set date and currency formats, determine how Alexandria reads patron and item barcodes, and more.

### CIRCULATION

With **Circulation Preferences**, you can configure the level of interaction that operators have with the program, what additional content is displayed, messages that appear in the patron notices sent from your library, and other general circulation settings

### PATRONS

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

### TEXTBOOKS

**Textbook Preferences** are used to configure general settings for everything that circulates, such as default item barcode ranges, default policies, terminology, and catalog settings.

As you set up your Alexandria Textbook Tracker preferences, keep an eye on the top right area of the screen; this will let you know if a preference area applies to just your SITE, or to your entire SYSTEM, and if the preference also affects your Alexandria Librarian setup.

## 4 Importing Patron and Item Information

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

Most new users take advantage of our data conversion service. If we've already imported your patron and item information for you, you can skip this section.

Alexandria can import patron and item records, pictures, and transaction scripts. Alexandria Textbook Tracker can import item information from outside sources (such as book vendors) in tab-delimited format.

Alexandria can import patron and operator data from any source capable of outputting text files in a tab-delimited format. With our FTP import functionality, Alexandria can import new (or update existing) patrons as they become available. Check with your front/district office to find out if your patron data is stored in a machine-readable format. We also offer several **SIS integration** options that add and update patron records automatically; see page 11/ our Administrative add-ons.

To import patrons and items into Textbook Tracker, append "/import" to the end of your Alexandria URL or go to **Tools > Import**.

**Related Import Topics in Alexandria's Support Center**
- **Import** Settings
- **Field Mapping** for patrons and items
- **Importing Patron Pictures**
- Importing **Transaction Scripts**

# TEXTBOOK TRACKER SETUP CHECKLIST

- ☐ Configure your site information and provide a valid email in **Sites Management**.
- ☐ Set up your Calendars.
- ☐ Set up the **Tools**.
- ☐ Set up **Preferences**.
- ☐ Import Patrons and Items.
- ☐ Login/ Setup any Add-Ons and Affiliate Services.

# ADD-ONS AND SERVICES

## Optional Interfaces and Add-Ons

**ALEXANDRIA LIBRARIAN**

The Alexandria Librarian interface is where you check regular library items in and out, run reports, perform utilities, access administrative tools, and change your preferences and policies for them. It can easily be used in conjunction with Textbook Tracker.

**GG4L**

GG4L is a K-12 industry collaborative that provides schools with various EdTech tools, including the secure exchange of school roster data between applications. Use the single sign-on (SSO) option to sign in to Alexandria using GG4L credentials.

**CLEVER**

Clever makes it easy to connect student information systems (SIS) with learning apps to ensure updated information everywhere. It's auto-rostered for district administrators.

**ACTIVITY**

Activity is an unattended kiosk interface that allows you to keep count of who's coming to your library or other areas at your site. You can download reports with Activity data, which can then be presented to administrators for planning and budgeting purposes.

# Hardware and Accessories

Our teams perform extensive testing on the hardware and accessories we sell, and we create our own guides to facilitate easy setups. Since we cannot guarantee that hardware purchased from 3rd parties will work with our programs, we recommend buying hardware that we have tested and approved here at COMPanion.

For more information on COMPanion-vetted hardware and accessories, visit our **online store**. We offer barcode readers, printers, the finest photo-composed and laser-printed labels, and more—all designed to work seamlessly with our software. Please contact our expert Sales Department at (800) 347-6439 or by email at sales@companioncorp.com to ask about our hardware products or accessories.

### SCANNERS
- Pre-configured to work with Alexandria
- Wireless scanners give you the freedom to roam while staying connected
- Advanced LED technology with bright, sharp aiming lines and high resolution imaging
- Read barcodes quickly and accurately without touching the label

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

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

# ADDITIONAL SUPPORT

Contact COMPanion's Sales or Customer Support departments via phone or email to learn more about Alexandria features. Our skilled and knowledgeable staff will be able to answer any technical or software-related questions you may have.

## Contact Sales

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

**Email**
sales@companioncorp.com

## Online Resources

**Support Center**
Explore Alexandria
Tip of the Week
Textbook Tracker Support Center

**Add-ons and Extras**
Partner Files
Add-on Support

## Contact Customer Support

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

**Email**
support@companioncorp.com

**Training and Videos**
Getting Started Resources
Alexandria Training Videos
Welcome to Alexandria

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