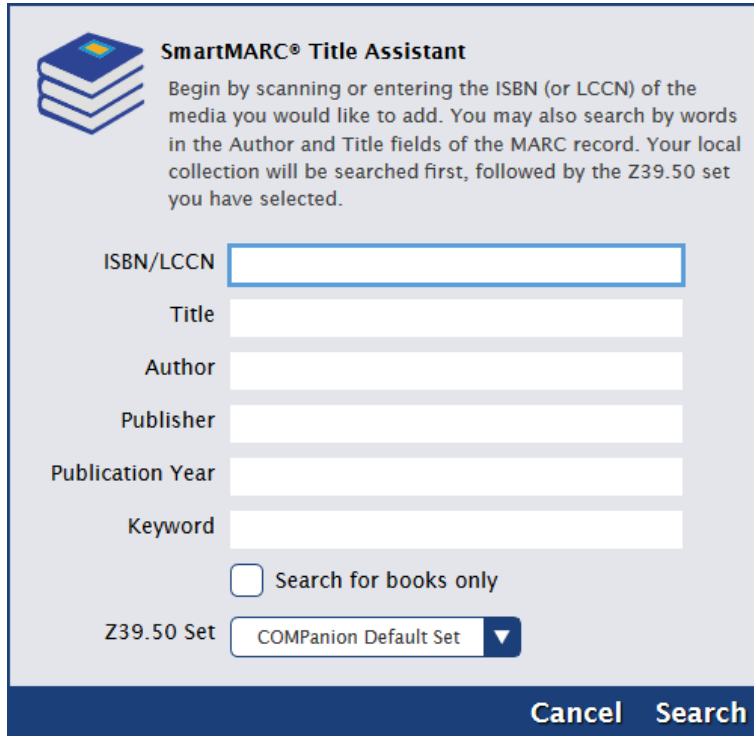# Refresher—Adding records

August 12, 2019

A new school year probably means adding new students and new items. But it's been a while since you've had to work in Alexandria... You might be thinking, "*Okay, I've opened the program... now how do I add records again?*" Don't worry. We've got your back! Let's go through a quick refresher.

Add patron records

Importing patrons

If you bring in your student records with an import, remember these five things:

1. In Alexandria Imports, make sure you choose **Patrons** from the list on the left. Or things will NOT go as planned.
2. Alexandria imports tab-delimited patron records in .txt or .tab format. (That's an easy export from Excel.)
3. Are you adding ONLY or also updating your patron records? Pick the right option under **Patron Updates**!
4. Don't mess up your barcodes. If your barcodes match your student numbers, and those are in the import file, choose to **Use Barcodes in Import File**.
5. If you're real fuzzy on how this works, read all the information under Import Patrons.

Adding patrons manually

Read through Add Patron Record for a quick reminder on how to add one patron at a time. Remember to enter an email so they can reset their password!

Add item records

Replace your copies first

If you did a bunch of weeding at the end of last term, you may want a list of popular or damaged items so they can be reordered. There are two ways to do this:

- Run a *Reordering Details* report found in **Tools** > **Reports** > **Copies** > **Information** > **Reordering Details**. Be sure to enter a range in the *Copies with Life to Date Usage* of selection.
- Do you use Discard Mode? Run the *Discarded Copies* report found in **Tools** > **Reports** > **Copies** > **Special Status** and select for a Discard Reason (e.g. "Loved to Death").

Add new titles early

What if you need to add titles that aren't quite ready for patrons yet? No problem! Just follow these steps:

1. While importing new items, in **Tools** > **Import** > **Items**, make sure *Set New Copies as 'In Processing'* is checked in the **Options** tab. This makes it so they aren't "available". Alternatively, you can give those items the "On Order" System Patrons special status by following the steps in On the way—On Order.
2. In **Preferences** > **Researcher** > **Auto-Hide**, make sure the options for *On Order* and *In Processing* are unchecked. That way, your patrons can still find these items in your catalog, place holds, and get excited! (Plus, you can show them off in a Slideshow.)
3. When your shiny new items are finally ready, bookdrop them to make them available.

Importing items

If you bring in your new item records with an import, remember these five things:

1. Quickly review Alexandria's Import Settings so you can correctly add/update your titles/copies.
2. Still not sure which setting you are looking for? Read up on the various settings and scenarios such as Add or Update Titles & Copies > Import New Books.
3. In **Imports**, make sure you choose **Items** from the list on the left.
4. Look under the **Options** tab to set some defaults like Location, Shelving, and Policies.
5. Quick imports are great. But if these are settings you use often, click **Create Saved Import** and skip all the tedious steps next time.

You may want to read about Importing MARC Records from a Vendor if you receive item records from vendors.

Adding items with Title Assistant

Title Assistant is a powerful MARC retrieval and management tool you can use to avoid duplicates!

Adding items manually

You should add items manually when they don't have MARC records (like projectors). Simply click on the plus icon at the bottom of the **Items** module. Then be sure to press **Enter** on your keyboard. Now you can fill in the item information and hit **Save** when you're done!

Now go and add all those patrons and items like a pro!

ⓘ These instructions are all for version 7. If you are still on version 6, learn about switching to Alexandria 7!

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