Welcome to Alexandria

Getting Started

How helpful was this page?

Unknown macro: 'rate'

Tell us what we can improve.

Save as PDF

Overview

ℹ Note this information has been moved to the new support center, see https://support.goalexandria.com/getting-started/guided-setup/

Overview

Welcome to Alexandria! We're happy to be joining you in the important task of running your library.

We know that learning new software can be a challenge, but the information on these tabs will give you a smooth and simple start. Whether you're a district administrator who needs to get Alexandria running or a librarian who only needs to learn how things work, you'll find what you need to get started right here!
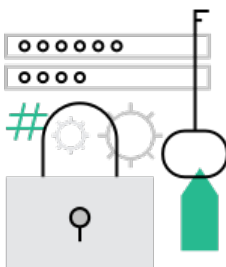
⚠ If your Alexandria system is already set up and you just need to learn how to use the program, skip the Set Up tab.

Set Up

Install and customize Alexandria.

Access

Log in to Alexandria.

Support Center

Learn how to use the Support Center.

Welcome to Alexandria

Watch instructional videos on the program.

See what additional help is available.

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Download and print Infographics

WelcomeAlex Researcher.pdf

WelcomeAlex Librarian 1.pdf

WelcomeAlex Librarian 2.pdf

Set Up

ⓘ Note this information is obsolete. See Alexandria Setup Options.

Set Up

Setting up Alexandria will be different depending on how your library has chosen to host your data.

Cloud Hosting

Cloud Hosting libraries save time and resources by letting COMPanion host your data. We perform daily archives and backups and handle all updates.

Registration is automatic. COMPanion will email you your Alexandria URL. With this, you can log in or create an account and start managing your library. Check out our *Getting Started Guide for Librarians* for guidance on setting up preferences, importing patrons, adding items, and more.

Self Hosting

Self Hosting libraries host their own data and are responsible for setting up and maintaining their installation and operations, including backups.

COMPanion will email you with instructions and links to important files for installing Alexandria. See our *Self-Hosted Guide for Admins* for instructions on installing on Windows or macOS, information on client and server communications, and guidelines for performing backups. Once installation is complete, you can log in or create an account. You'll then want to look through our *Getting Started Guide for Librarians* for guidance on setting up preferences, importing patrons, adding items, and more.

Logging In

For both cloud-hosted and self-hosted users, you'll need to create a District Administrator account the first time you try to log into Alexandria if you're brand new. Simply fill out information in the form that pops up. If you're coming from a previous version of Alexandria, you can log in with your old account.

Access

See Accessing Alexandria.

Support Center

ⓘ Note this page is obsolete with the new support center. See https://support.goalexandria.com/

Support Center

Alexandria's Support Center contains helpful articles, informative videos, and other resources to help you use Alexandria to its full potential.

Organization

The Support Center is organized just like Alexandria, with the top navigation bar mostly matching the program's side navigation bar (sidenav).

The navigation bars have seven sections in common:

1. Circulation
2. Items
3. Patrons
4. Operations
5. Tools
6. Researcher
7. Preferences

The Support Center's extra Support tab links to more resources, such as Getting Started, Release Notes, Tip of the Week, Video Directory, and Contact Us.

Access

Clicking on the help icon in the top right corner of Alexandria will open the Support Center page that relates to that part of the program.

You can also bookmark the Support Center's homepage on your internet browser.

Indicators

Throughout the Support Center, you'll notice indicators/notes that will give you important information:

Indicator/Note	Meaning
Preferences > Advanced Bookings	This shows where the stuff on that page can be found within the program.
⚠ **SYSTEM Preference** or ⚠ **SITE Preference**	The preference applies to either the system (all libraries in your group) or site (your individual library).

SHARED with Textbook Tracker	The preference or section shares data with Textbook Tracker.
Textbook Tracker **Textbook Tracker: *Remove Textbooks***	The report or utility can also be found in Textbook Tracker; if it has a slightly different name, it will be listed in italics.
Teach your patrons! 	Green boxes titled "Teach your patrons!" contain resources (PDFs and videos) meant for your patrons. Distribute or post these resources so your patrons can learn how to use Alexandria's Researcher! Other green boxes contain random tips related to the page's content.
 	Yellow and red boxes contain important information related to the page's content.

Feedback

We want to hear from you! Each page gives you the opportunity to rate the content on a scale of 1–5 stars. Your feedback will help our team understand what's working well and identify areas for improvement.

Rate a page

To rate a Support Center page, find the rating block on the left-hand side of the page. Under **Your Rating**, click on the amount of stars you'd like to give that page. Then, your rating will be added to the **Results**, which shows the average rating in addition to the total.

Give us more details

After rating a page, you also have the option to give us more details by clicking **Tell us what we can improve.** This short survey will let you elaborate on your rating and—optionally—leave your email so we can follow up if needed (don't worry—your email will be kept private). We appreciate it!

Alexandria University

See Video Directory#AlexandriaUniversity.

Resources

ⓘ Note this information has been moved to https://support.goalexandria.com/getting-started/ ; and https://support.goalexandria.com/resources/

Resources

Email Lists and Groups

- **Tip of the Week.** Sign up to receive weekly tips that help you use Alexandria efficiently.

- **Newsletter.** Subscribe to our monthly newsletter for seasonal posters, book reviews, activity ideas, and more.

- **Releases.** Sign up to receive information on new features and other updates.

- **User Research Group.** Apply to join a group of Alexandria users who give feedback on future features and projects.

- **Alexandria Users Group.** Join our Facebook group to discuss all things Alexandria with other librarians.

Set Up

- **Barcode Your Collection.** Read about best practices when it comes to barcoding your collection.

- **Back Up Your Data** & **Archive Your Data.** Create copies of your Alexandria database.

- **Scanner and Printer Installation/User Guides.** Figure out how to set up and use library hardware.

- **Basic Training Guide** | **Guía Básica de Entrenamiento.** Learn the basics of using Alexandria.

- **Why You Need Policies.** Establish rules that regulate how library resources are used by your patrons.

- **Import Patrons and Items.** Add multiple records at once for your patrons and library items.

- **Configure Your Preferences.** Customize Alexandria to fit your library's needs.

- **Security Best Practices.** Determine program permissions and access for librarians and patrons.

- **Email Notices.** Set up email notifications for your patrons and librarians.

More Resources

- **Tip of the Week.** Check out our archives for past tips that'll help you get the most out of Alexandria.

- **FAQs.** Get your questions answered! See our Trending FAQs section for questions recently answered by Customer Support.

- **Maintenance Strategies.** Get guidance with beginning and end of year procedures, cleaning up your data, and more.

- **Hotkeys Reference.** Print a sheet with basic program shortcuts to reference as you learn them.

- **Circulation Commands Reference.** Print a sheet with Alexandria's Circulation Commands to reference as you learn them.

- **Video Directory.** Check out all of our videos about Alexandria, including how-tos, workshops, tips, and more.

- **Webinars.** Tune into webinars with our certified trainers, who will provide guidance and answer questions on the topic.

- **One-on-one training.** Contact our Sales Team if you're interested in purchasing and scheduling one-on-one training.

- **Customer Support.** Need a question answered? Our 24/7 Customer Support is here to help!

Other COMPanion Support Centers

Textbook Tracker

KeepnTrack